

Air Education and Training Command

Sustaining the Combat Capability of America's Air Force



Standard Procurement System Functional Training – Upgrade 4.2v1

U.S. AIR FORCE

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1 April 2003**

Integrity - Service - Excellence



Disclosure Statement



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Topics



- Desktop
- Requirements
- Line Item Detail
- Pre-Award/Award
- Indefinite Delivery Contracts
- Proposal Negotiation Documentation
- Post-Award



Desktop Toolbar and Menu Features



- Generate Icon
- Release Icon
- Document Properties Related Items
- Tracking Codes and Document Chain
- Help (PD² Advisor)
- Reference Library
- Automatic Closeout



Generate



- New **Generate** toolbar icon
- Generate CLINs, Summary of Changes, Document and Mod Document in one stroke
 - *PR & PR Mods are generated. This allows PR/PR Mod text documents (attachments and clauses) to be printed*
- Generate from closed document
- Option to use ASF to process generation



Generation in v4.1



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Characteristic
Classification
Stepladder Pricing Structure
SBA Address
Auto Selection Clauses
Analyze
Generate CLINs
Generate Section I
Generate Document
View Document
Export Document
Future View
Local Information
Modification...
Generate Summary of Changes
Generate Modification Document

01-P-0001

Items 17 - 25

CLAUSES

S OR SERVICES

PAGE 1 OF 7

3. DATE OF ORDER/ CALL 2001 Jan 17

4. REQUISITION/ PURCHASE REQUEST NO. 222-222-33445

5. PRIORITY

7. ADMINISTERED BY CODE

See Item 6

8. DELIVERY FOB
☒ DEST
☐ OTHER
(See Schedule if other)

10. DELIVER TO FOB POINT BY
See Schedule

11. MARK IF BUSINESS
☐ SMALL
☐ SMALL DISADV'TG'D
☐ WOMEN-OWNED

12. DISCOUNT TERMS

13. MAIL INVOICES TO THE ADDRESS IN BLOCK

Delete FACILITY Add See Item 15

Brenda Blanket Purchase Master Agreement
F44600-01-C-0004
For Lorie Commercial Contract Award
04 DEC 00 10:26
jmoss
Released

Ready January 22, 2001 7:17 PM

Start Je... A... Mi... Pr... P... W Mi... 7:17 PM



Generation in v4.2



Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

Document Generation Options

CLIN/Special Options

- ☒ CLINs
- ☒ Inspection/Acceptance Terms
- ☒ Delivery Information
- ☒ Accounting/Appropriation Data
- ☐ IDC Constraints
- ☐ Exhibit/Attachment Table of Contents
- ☐ EPA Limits and FSCs
- ☐ Summary of Changes

CLIN Range

☒ All

☐ Range

From:

To:

To generate a range of CLINs clear the document check box.

Document Options

- ☐ Document
- ☒ Sort by Default
- ☐ Revision Marks
- ☐ Modification Document

Run Location

☒ Local

☐ ASF Server

OK Cancel



Release



- New **Release** toolbar icon
- Release all Document types (e.g., Solicitations, Awards, Modifications) using the same Icon or Option under **Procurement** Menu

Note: PR mods are still released and PRs are not



Release in v4.1x



Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

Requirements
Pre-Award / Award
Post-Award
Milestone Plan
Checklist...
Contract Distribution List...
CBD Announcement...
Correspondence Log...
Memorandum of Agreement...
Attachment
Analyze...
Customer Feedback Form...
EDI Transmit...
DD 1057 Feeder Information...
Reports...
Workload Management...
Automatic Assignment
User Workload...

Solicitations
Offer Evaluation...
Certify Funds
Awards
FPDS Reports
Audit Tracking...
Vendor Dispute Tracking...

P-0001-U00006 08 JAN jmoos
Order Modification
C 04 JAN jmoos
19 DEC jmoos
18 DEC 00 17:35 jmoos
07 DEC 00 18:54 jmoos
06 DEC 00 17:42 jmoos
04 DEC 00 10:26 jmoos

Architect-Engineer Contract (SF 252)...
BPA Master Agreement (DD Form 1155)...
Commercial Purchase (SF 1449)...
Construction Purchase (SF 1442)...
External Award...
Imprest Fund Disbursement...
Large Purchase (SF 26)...
Large Purchase (SF 33)...
Simplified Purchase (DD Form 1155)...
Automatic Ordering...
Release Award

333333
c to d
Purchase Request
F44600-01-A-0002
Brenda
Blanket Purchase Master Agreement
F44600-01-C-0004
For Lorie
Commercial Contract Award

Released

Ready January 22, 2001 7:21 PM

Start Je... A... Mi... Pr... P... W Mi...



Release in v4.2 - Toolbar



Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

Release

Lorie's Cabinet

Number	Description	User	Date	Type
N00025-02-D-2001	Award / Contract	higgins	17 JAN 02 10:00	
N00025-02-C-1003	Award / Contract	higgins	17 JAN 02 09:29	
N00025-01-A-0003-0002	BPA Call	higgins	15 JAN 02 13:24	
N00025-01-A-0003-0002	Notification of Award Letter	higgins	14 JAN 02 08:19	

Outbox

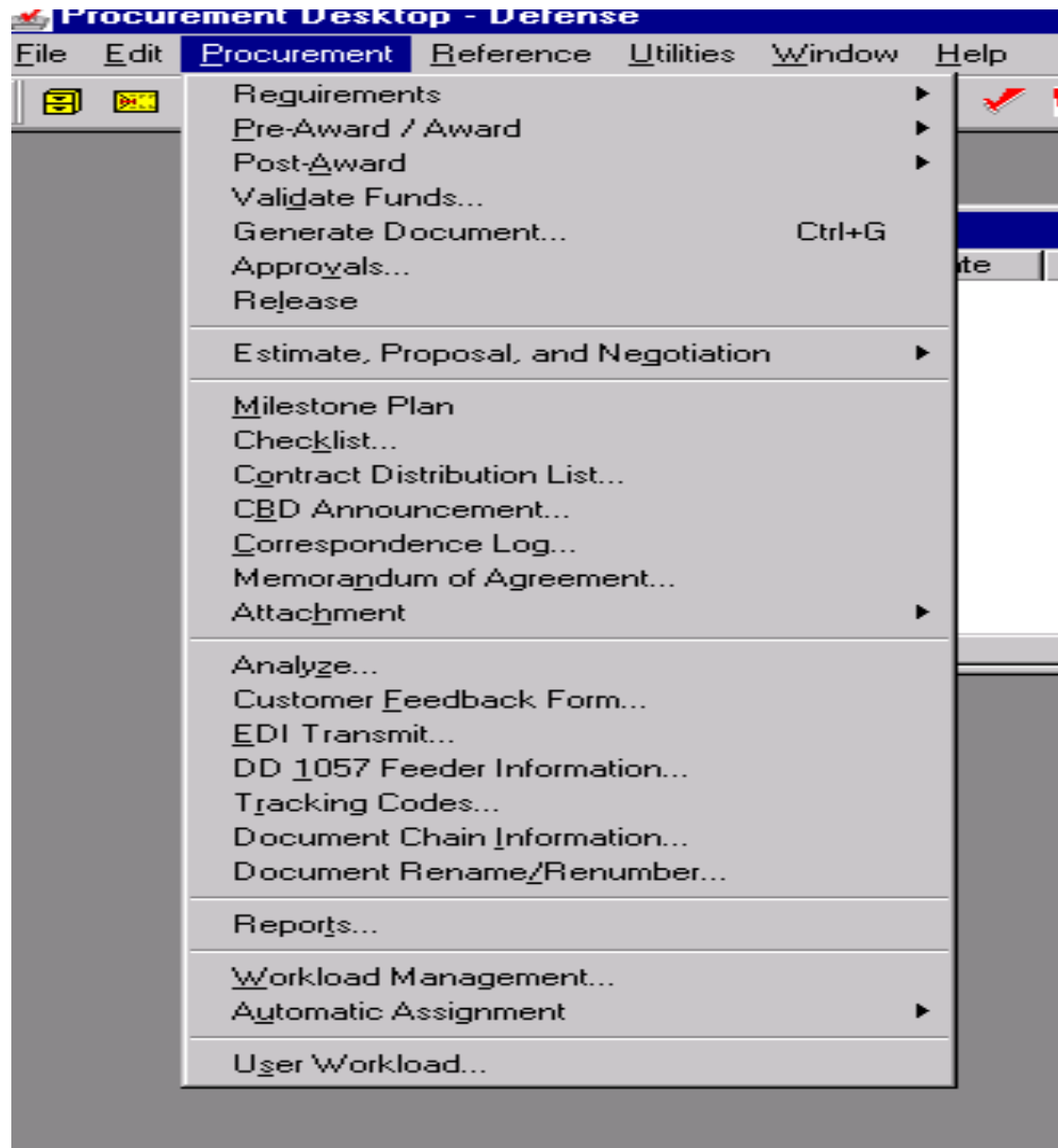
Inbox workload m... PROCESS FR... cost type ASSOC/EST ... IDIQ CONTR...

Ready January 17, 2002 1:08 PM

Start Lorie Higgins - Inbox - Lot... Microsoft PowerPoint - [P... Procurement Desktop ... 1:08 PM

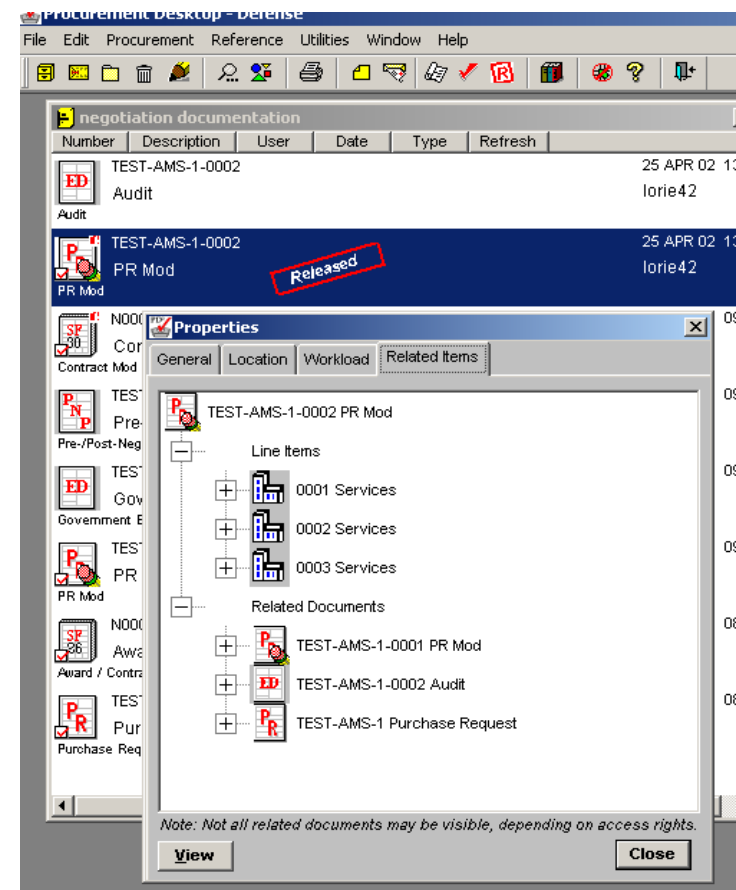
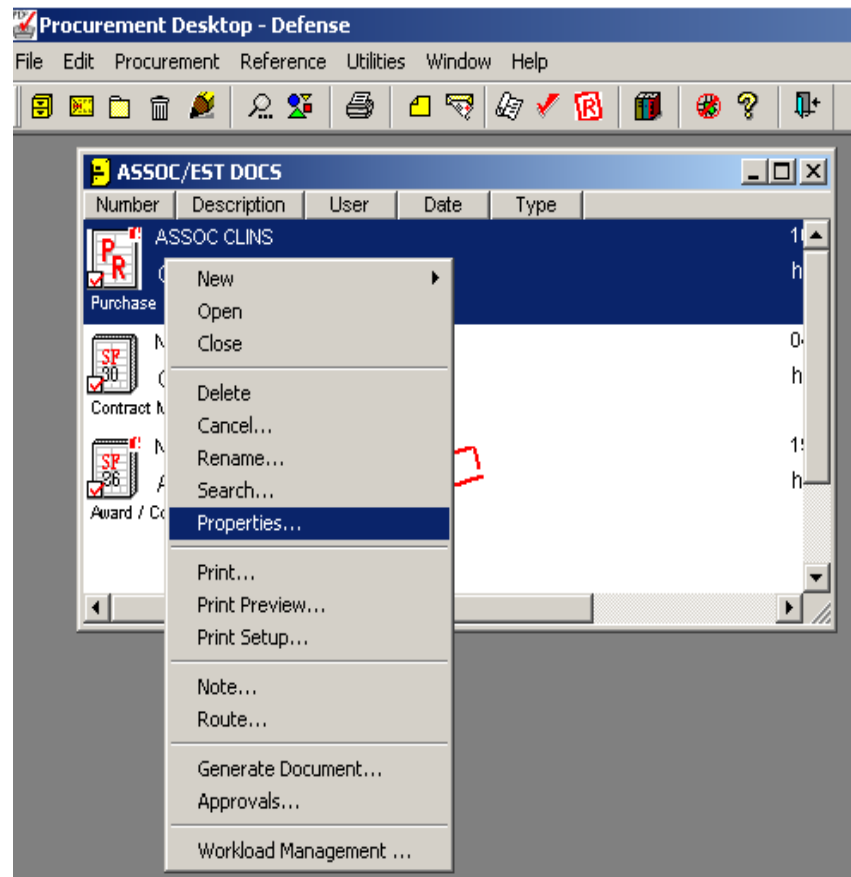


Release in v4.2 - Menu





Document Properties Related Items



- **New Tab in Properties window**
- **Displays information including Document Association**
- **To view all associated documents including DD350s, click the Related Items Tab; does not show attachments or CDRLs**



Tracking Codes and Document Chain Information



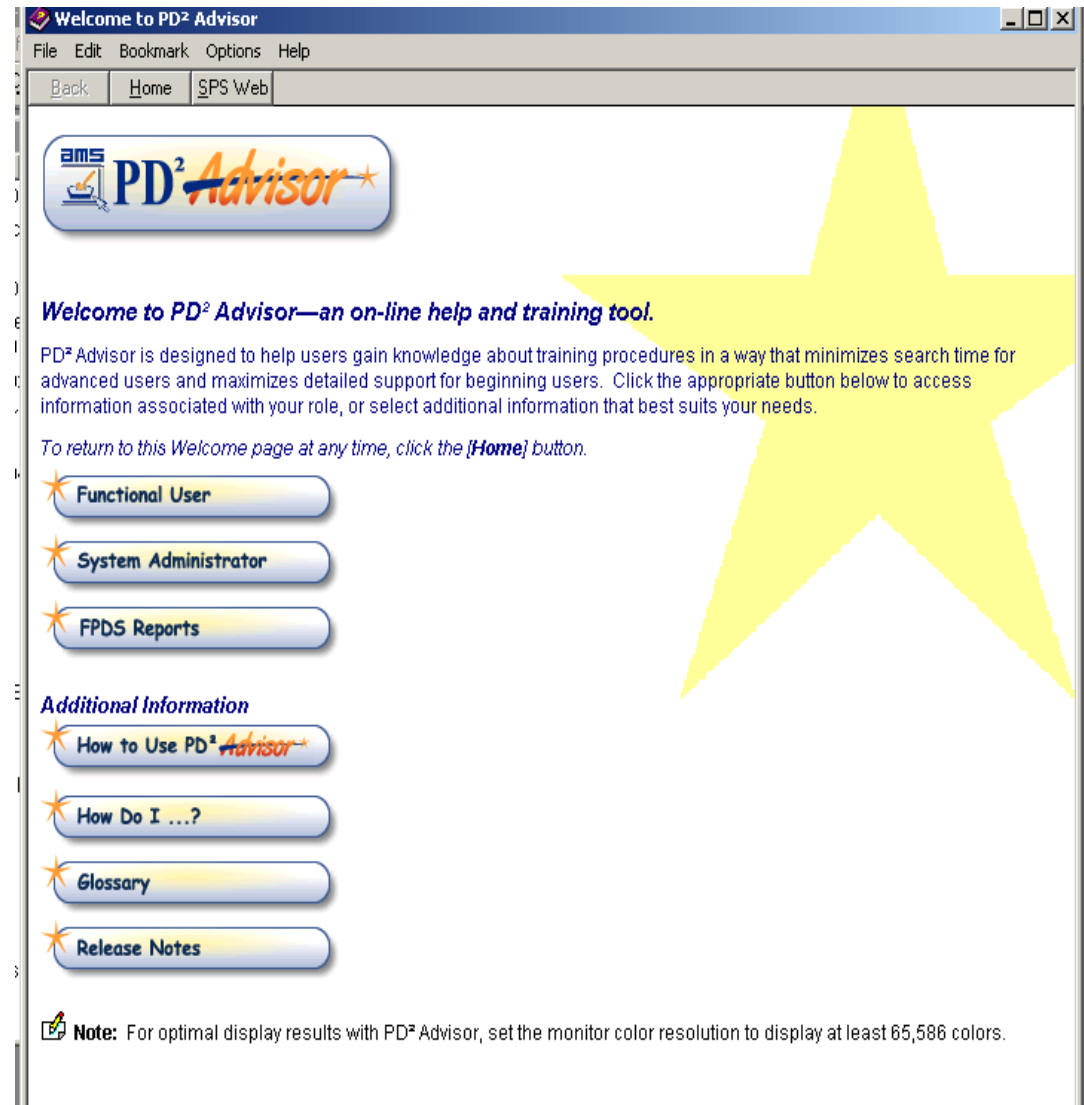
- Additional local data can be defined through System Administration
- Tracking codes support the tracking of documents for management and workload reporting purposes
 - PCO/ACO codes
 - Document types
- Document Chain Information provides additional unlimited local data fields
 - Applies to a base procurement document and its modifications
 - Editable at any point in the procurement process without the need for an SF 30 modification.



Help - PD2 Advisor



- New On-Line Help Tool
- Opens in separate window for split screen viewing with PD²
- How Do I . . ? provides step-by-step instruction
- Glossary
- Release Notes
- Supports learning and performance





PD2 Advisor



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Trainer's Cabinet

Number	Description	User	Date	Type	Refresh
SPS000-02-P-4000	Simplified Acquisition	trainer1	01 MAY 02 12:50		
SPS000-02-R-4000	Commercial Solicitation	trainer1	24 APR 02 14:10		

Commercial Solicitation - SPS000-02-R-4000

Items 1 - 16 Items 17 - 26 Items 27 - 31 Clauses

SOLICITATION/ CONTRACT/ ORDER FOR COMMERCIAL ITEMS

1. REQUISITION NUMBER

2. CONTRACT NUMBER

3. AWARD/EFFECTIVE DATE

4. ORDER NUMBER

5. SOLICITATION NUMBER SPS000-02-R-4000

6. SOLICITATION IS

7. FOR SOLICITATION A. NAME

8. TELEPHONE NO. 703-555-8787

8. OFFER DUE DATE

9. ISSUED BY CODE SPS123

DEFENSE PROCUREMENT COMMAND

10. THIS ACQUISITION IS

☒ UNRESTRICTED

☐ SET ASIDE: % FOR

☐ SMALL BUSINESS

☐ SMALL DISADV. BUSINESS

☐ 8(A)

11. DELIVERY DESTINATION BLOCK IS MA

12. DISCOUNT

13a. THIS CONTRACT IS A RATED

13b. RATING

14. METHOD OF SOLICITATION

☐ RFQ ☐ IFB ☒ RFP

15. DELIVER TO CODE

16. ADMINISTERED BY CODE

See Schedule

Details... Delete

Details...

Delete

Inbox

DOCUMENTS

Closeout

Property

Active Cont...

Outbox

Ready

May 1, 2002 5:30 PM

How Do I?

File Edit Bookmark Options Help

Help Topics Back Print << >> Home SPS Web

How Do I...?

- * Complete List *
- Create a PR
- Work with Funding
- Work with Attachments
- Route Documents
- Approve Documents
- Use Checklists
- Use Milestone Plans
- Create a Solicitation
- Create an Award
- Create FPDS Reports
- Modify Awards
- Create Delivery/Task Ord
- Flag a Document for EDI
- Maintain Organization and
- Manage Workload and Tr
- Close Out a Contract
- Use PD² Reporting Functi
- System Administration

Commercial (SF 1449)

From the Pre-Award/Award module, an on-line SF 1449, Solicitation for Commercial Items can be completed. The Solicitation for Commercial Items can be an RFQ, IFB, or RFP.

To create an SF 1449 Solicitation:

1. [Create new SF 1449 Solicitation.](#)
2. [Complete/edit the /items 1-16 tab.](#)
3. [Enter/edit the CLIN Information on the /items 17-26 tab.](#)
4. [Add/edit funding, if applicable.](#)

Note: Funding information does not display on the generated or printed version of solicitations.

5. [Complete/edit the /items 27-31 tab.](#)
6. [Complete/Edit the Clauses tab.](#)
7. Save and close the document.
8. [Generate the document.](#)
9. [Attach the Approval Sheet.](#)
10. [Release the document.](#)

**Drill-down
to access
information**

**Split
screen
viewing**



Reference Library



Procurement Desktop - Defense

Trainer's Cabinet

Number	Description	User	Date	Type	Refresh
SPS000-02-P-4000	Simplified Acquisition	trainer1	01 MAY 02 12:50		
SPS000-02-R-4000	Commercial Solicitation	trainer1	24 APR 02 14:10		

Commercial Solicitation - SPS000-02-R-4000

Items 1 - 16 Items 17 - 26 Items 27 - 31 **Clauses**

Clause/CLIN Number	Editable	Required	Incorporation
SECTION: SF 1449 - CONTINUATION SHEET			
0001 Services, custodial	Editable		
Inspection/Acceptance Terms Classification:	Editable		<input type="checkbox"/>
Delivery Information Classification:	Editable		<input type="checkbox"/>
52.208-9 Contractor Use of Mandatory Sources of Supply	Read-Only	RWA	<input checked="" type="radio"/> By Reference <input type="radio"/> By Full Text
52.209-6 Protecting the Government's Interest When Subcontracting With Contractors Debarred, Suspended, or F Debarment	Read-Only	RWA	<input checked="" type="radio"/> By Reference <input type="radio"/> By Full Text
52.211-7 Alternatives to Government-Unique Standards	Read-Only	RWA	<input checked="" type="radio"/> By Reference <input type="radio"/> By Full Text

Delete Add Clause Edit Usage... Refresh... Add Text... Sort

Ready May 1, 2002 5:35 PM

Welcome to the Reference Library Home Page! - Microsoft Internet Exp...

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Links

Address D:\Reference Library\welcome.htm Go Links

PD² Reference Library

The books shown below open current versions of the Federal Acquisition Regulation ([FAR](#)) and Defense Acquisition Regulation Supplement ([DFARS](#)). The FAR provides specific guidance to government contracting officials on how to conduct acquisitions. In addition to the FAR, the Department of Defense has a supplemental acquisition regulation called the DFARS, that provides information applicable to DoD agencies and military services within the Department of Defense. Sites can include their own supplemental acquisition regulations, local policies and procedures, and other site-specific documents in "My Local Books."

Additional Reference Material

- [FAC Publications](#)
- [Clause Logic](#)
- [Web Directory](#)
- [DFAS Reference Document](#)

FAR

DFARS

My Local Books

File:///D:/Reference Library/framesetfar.html My Computer

Uses RoboHelp instead of SmartText

Supports addition of local documents

Opens with internet browser

Hyperlinks to Acquisition web-sites

Split screen viewing with PD²

Return to the Reference Library Home

PART 215-CONTRACTING BY NEGOTIATION

TABLE OF CONTENTS

[215.000 Scope of part.](#)

[SUBPART 215.2--SOLICITATION AND RECEIPT OF PROPOSALS AND INFORMATION](#)

[215.204-1 Uniform contract format.](#)

[215.204-2 Part I--The Schedule.](#)

[SUBPART 215.3--SOURCE SELECTION](#)

[215.303 Responsibilities.](#)

[215.304 Evaluation factors and significant subfactors.](#)

[215.305 Proposal evaluation.](#)

[SUBPART 215.4--CONTRACT PRICING](#)

[215.403 Obtaining cost or pricing data.](#)

[215.403-1 Prohibition on obtaining cost or pricing data.](#)

[215.403-5 Instructions for submission of cost or pricing data or information other than pricing data.](#)

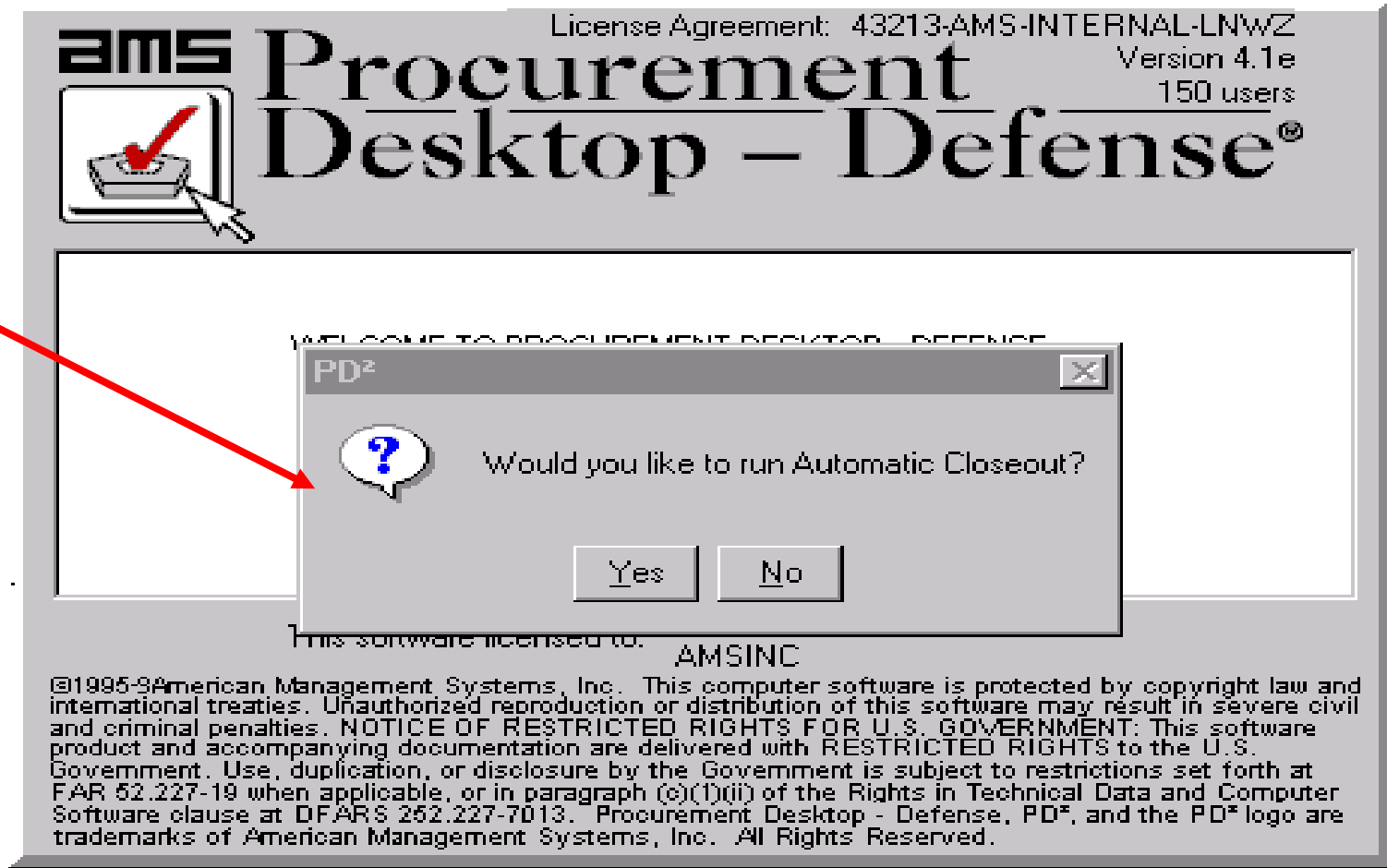
[215.404 Proposal analysis.](#)



Automatic Closeout



V4.1
X



- ✓ Moved to SA Task
- ✓ No longer is user prompted upon login as shown above



Requirements



- Additional Data Fields
- Clauses
- Requirements Status
- Funding Status
- PR Numbers up to 30 characters everywhere
- Supports bulk funding PRs



Additional Fields in v4.2



- New Information Blocks – Project Number, Planned Execution Method and Date, Date Proposal Due, and Classification Subtypes
- Entries in Dropdown boxes are editable through the SA Task System Tables

PR Mod - NEW REQN-0001

Main Form | Line Items | Contracts | **Add'l Data** | Clauses

Additional Data

Description PR Mod	Purchase Request Number NEW REQN-0001		
Requisition Date 28-Mar-2001	DPAS Priority Rating POC9e	Priority 12	
Additional Point of Contact (POC) Information		Security Clearance Required <input checked="" type="radio"/> Unclassified <input type="radio"/> Secret <input type="radio"/> Confidential <input type="radio"/> Top Secret	
J/A Number		Project Number:	
Details... Add		Add	
Property Officer Information		Planned Execution Method: Date:	
Details... Add		Date Proposal Due:	
		Classification Subtypes	
		Code Description	
		Edit	



PR Clauses Tab in v4.2



- Allows requestor to incorporate SOW, Wage Determination and other documents onto the PR
- Allows requestor to address specific clauses applicable to its needs and be incorporated in contract documents
- The Contracting Officer is still responsible for incorporating appropriate clauses in solicitations and contracts

Purchase Request - PRESENTATION

Main Form | Line Items | Contracts | Add'l Data | **Clauses**

Clause/CLIN Number	Editable	Required	Incorporation
CATEGORY: Supplies or Services and Price			
0001	Editable		
Services			
0002	Editable		
Services			
0003	Editable		
Services			
CATEGORY: Descriptions and Specification			
Statement of Work		Editable	<input type="checkbox"/> Not Included
Classification: Statement of Work		Special Instructions:	
52.211-9	Fill-In	OPT	<input checked="" type="radio"/> By Reference <input type="radio"/> By Full Text <input type="checkbox"/> Not Included
Desired and Required Time of Delivery			

Delete | Add Clause | Edit | Usage... | Refresh... | Add Text... | Sort | Match...



Requirements Status in v4.2



Trace Document Pricing and Award Status

Procurement Desktop - Defense

File Edit **Procurement** Reference Utilities Window Help

Requirements

- Pre-Award / Award
 - Post-Award
 - Validate Funds...
 - Generate Document... Ctrl+G
 - Approvals...
 - Release
- Estimate, Proposal, and Negotiation
- Milestone Plan
- Checklist...
- Contract Distribution List...
- CBD Announcement...
- Correspondence Log...
- Memorandum of Agreement...
- Attachment
- Analyze...
- Customer Feedback Form...
- EDI Transmit...
- DD 1057 Feeder Information...
- Tracking Codes...
- Document Chain Information...
- Document Rename/Renumber...
- Reports...
- Workload Management...
- Automatic Assignment
- User Workload...

PR Form...
IR Form...
Copy PR/TR...
MIPR (DD Form 448)...
Security (DD Form 254)...
CDRL (DD Form 1423)...
PR Modification...
TR Modification...
Requirement Status
Funding Status

Lorie's Cabinet

Number	Description	User	Date	Type
NEW REQN-0001	PR Mod			
N00025-01-P-0001	Small Purchase Award			
Small Purchase Award				
NEW REQN	Purchase Request			
Purchase Request				

Requirement Status - Purchase Request: NEW REQN

Line Items for Selected Document

Item/Subitem Number	Description
0001	widgits

Line Item Status Details

Line Item Description: widgits

Currency: US \$

Original Amount: 35,000.00

Award Status: Awd/Defn

Pricing Status: Definitized

Estimated Amount: .00

Proposed Amount: .00

Objective Amount: .00

Negotiated Amount: .00

Mod Linked Document Doc Code Release Date

Selected PR



Trace Committed Versus Obligated Funds

New Folder

Lorie's Cabinet

Number	Description	User	Date	Type
pr/prmods				
N00025-01-P-0008-P00001	PO/DO Mod			1
PO/DO Mod				h
LH-01-0001	PR Mod			1
PR Mod				h

Released

Released

Line Item Funding Status - LH-01-0001

LH-01-0001
PR Mod

Line Item

0001

0002

Display

☒ Obligations

☐ Pending Obligations

Committed Amount: \$45,000.00

Obligated Amount: \$45,000.00

Available Amount: \$0.00

Pending Obligated Amount: \$0.00

Contract Number	CLIN	Obligated Amount	Document Owner
N00025-01-P-0008-P00001	0001	\$45,000.00	Lorie A. Higgins



Line Item Detail



- Change Contract Type without adding new CLIN in Pre & Post Award
- Line Items *without quantity or price*
- Info SubCLINs *with quantity or price*
- Detail Tab - *NSN, CLIN Template, Delivery, Option, EST and NSP*
- Description Tab - *NAICS*
- Pricing Tab - *Minimum/Maximum Order Constraints*
 - *Priced/Unpriced indicator button*
- Funding Tab - *Lines of Accounting and ACRN*
- Shipping Tab - *FOB Information*



NSN



- Moved to the *Detail* tab in **Line Item Detail**
- **Search** button allows you to select from the NSN database
- Automatically populates applicable fields in the **Line Item Detail**
- Overrides any data in information blocks



NSN in v4.1x



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail - [Read Only]

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 construction work subject to Davis-Bacon Global Chg

Add Manufacturer:

Manufacturer Part Number:

Vendor Part Number:

Prod / Cat Number:

Drawing Number:

Spec. Number:

Serial Number:

Piece Number:

Model Number:

NSN:

Size:

Suggested Contract Vehicle/GSA Schedule:

Project:

Inspection/Acceptance

Codes

FSC:

SIC:

PROG:

WSC:

SMIC:

Cognizance Sym:

Media/Status CD:

Color:

Signal CD:

OK

Cancel

Ready

March 28, 2001 10:52 AM

Start Lorie Higgins - Inbox - Lotu... Microsoft PowerPoint - [diff...] Procurement Desktop... PD-SQLAnywhere-32bit 10:52 AM



NSN in v4.2



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: FFP IDC Type: N/A

NSN Search

Search Criteria

Search by: NSN: Description:

Search Results:

NSN	Description	Unit of Issue	Var Qty +	Var Qty -	Brand Name/ Sole Source
1005-00-118-6192	Firing Attachment, Blank	Each	10	10	BN
M-16 rifle attachment for firing blanks. Forces blank shell ejection. 1-5/8" x 1-1/2" x 1-3/16" frame assembly, hexagonal bushing, threaded restrictor, 1-1/4" diameter pull ring. Palletized. Standard Pack: 1/50. Shipping Weight: 13.4 pounds. Spec.					
1005-00-288-3565	Swab, Small Arms Cleaning	Each			BN
These swabs are made of unbleached, clean, single evenly developed cotton cloth. They are of two sizes, 1-3/8" x 1-3/8" and 2-9/16" x 2-9/16". Swabs are packed in chipboard boxes according to size. Swabs made per Army drawings #11688408 and #3565 - 30.					
1005-00-312-7177	Sling, Padded, Adjustable	Each			
Heavy textile webbing. Approximately 5-1/2 feet long. Used with the M-60 machine gun. Padded area about 18" x 2" in center of sling. Metal keeper on each end. Black. Specs outlined in Data List #1200202. Standard					

Search Select Cancel

AF team Outbox Trash DCMA Inbox exhibits

Ready January 24, 2001 2:15 PM

Start Procurement Desktop... Microsoft PowerPoint - [4.2...]

3:13 PM

- Search for NSN number



NSN in v4.2



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Award / Contract - DABT32-01-C-0001

Items 1 - 10 Items 11 - 15 Items 16 - 20 Clauses

11. SHIP TO CODE 12. PAYMENT WILL BE MADE BY CODE S49451

See Schedule

13. AUTHORITY FOR USING OTHER OPEN COMPETITION:
☐ 10 U.S.C. 2304(c)

15. Item/Subitem Number Description

15 G. Total Cost

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number 0001 Contract Type Change FFP IDC Type N/A

NSN Search 1005-00-288-3565 CLIN Type Priced Info Only

Description Swab, Small Arms Cleaning

Extended Description These swabs are made of unbleached, clean, single evenly developed cotton cloth. They are of two sizes, 1-3/8" x 1-3/8" and 2-9/16" x 2-9/16". Swabs are packed in chipboard boxes according to size. Swabs made per Army drawings #11686408 and #3565 - 30.

Quantity Unit Price Line Item Cost

Item Calculation X

Unit of Issue Each Options Opt # Cost Constraint

Stepladder Pricing Test Type No Test Exhibit Include Sublines

Template FFP N/A - Default

Global Chg... Test Info Delivery Copy CLIN Add Insert SubCLIN Add Insert Delete Associate OK Cancel

AF team Outbox Trash DCMA Inbox exhibits

Ready January 24, 2001 2:15 PM

Start Procurement Desktop... Microsoft PowerPoint - [4.2...]

3:15 PM

- Automatically Populates



CLIN Templates



- v4.1x - ONLY one CLIN template per contract type; i.e. 1/Firm Fixed Price IDIQ; 1/Cost Plus Fixed Fee, etc.
- v4.2 - SAs are able to create an unlimited number of new CLIN templates per contract type



CLIN Templates in v4.1x



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: T&M IDC Type: N/A Hand Carry: ☐

Delivery Date: 18-Apr-2002

Description: stuff

Extended Description:

Est. Quantity: 100.00 Unit Price: 300.00 Line Item Cost: 30,000.00

Item Calculation: 100.00 X 300.00 = 30,000.00

Period of Performance: Start Date: End Date: Period: ☒ Base ☐ Option Opt #: Cost Constraint:

Unit of Issue: Each Test Type: No Test ☐ Exhibit ☐ Include Sublines

Stepladder Pricing: ☐

Global Chg Test Info Copy Add Insert SubCLIN Add Insert Delete Associate OK Cancel

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: T&M IDC Type: N/A Hand Carry: ☐

Delivery Date: 18-Apr-2002

Description: stuff

Extended Description:

Est. Quantity: 100.00 Unit Price: 300.00 Line Item Cost: 30,000.00

Item Calculation: 100.00 X 300.00 = 30,000.00

Period of Performance: Start Date: End Date: Period: ☒ Base ☐ Option Opt #: Cost Constraint:

Unit of Issue: Each Test Type: No Test ☐ Exhibit ☐ Include Sublines

Stepladder Pricing: ☐

Global Chg Test Info Copy Add Insert SubCLIN Add Insert Delete Associate OK Cancel



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: **Change** FFP IDC Type: N/A Hand Carry: ☐

NSN: **Search** CLIN Type: ☒ Priced ☐ Info Only

Description:
Extended Description:
Quantity:
Unit Price:
Line Item Cost:
Item Calculation: **X**
Unit of Issue:
Options:
Opt #:
Cost Constraint:
Stepladder Pricing: ☐ Test Type: No Test ☐ Exhibit ☐ Include Sublines

Template: FFP-N/A Custom Format for NSN

Global Chg...
Test Info
Delivery
Copy
CLIN
Add
Insert
SubCLIN
Add
Insert
Delete
Associate
OK
Cancel

000 all bookmarks
Funded SubCLIN
000 2nd test of all
FFP-N/A Custom-Format-One
FFP N/A Test templaet
FFP-N/A Custom Format for NSN
FFP-N/A Custom Format One MRO
FFP-Custom Format for NSN



Delivery



- New **Delivery** button on *Details* tab
- Delivery Schedule and Multiple Deliveries (Quantities, Dates, and Addresses) per CLIN or SubCLIN
- Global change for a delivery schedule
- NOTE: In awards using the SF33 or SF1442, v4.2 will not convert ADC dates to actual dates in the schedule after generation, but will upon release, and then bases the date on the effective date of the contract. However, users may manually edit the dates after generation but before release.



Line Item Detail Modifications - [Read Only]

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: FFP IDC Type: Indefinite Quantity Hand Carry: ☐

Delivery Date: 30-Mar-2001 CLIN Type: ☒ Priced ☐ Info Only

Description: wldgits

Extended Description:

Item Information	Max Quantity	Unit Price	Max Line Item Cost
0.00	0.00	0.00	0.00
Amount of Mod.	2,500.00	25.00	62,500.00
New Totals	2,500.00	25.00	62,500.00

Period of Performance: Start Date: End Date: Period: ☒ Base ☐ Option Opt #: Cost Constraint:

Unit of Issue: Each Test Type: No Test ☐ Exhibit ☐ Include Sublines

Stepladder Pricing: ☐

Global Chg Test Info CLIN Add Insert SubCLIN Add Insert Delete Associate OK Cancel

Line Item Detail Modifications - [Read Only]

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 wldgits

Address: 1 CONS/CC CODE F44600
JANE SMITH / PROGRAM MANAGER
74 NEALY AVENUE
SUITE 109
LANGLEY AFB VA 23665-2088

FOB: Destination

Add'l Markings:

Charge Shipping To:

Shipping Mode:

MILSTRIP:

HAZMAT:

Transport Control:

Transport Priority:

Delete Packing... OK Cancel

- No multiple deliveries – only one Date, Quantity and Ship to address allowed per CLIN



Line Item Detail [X]

Detail | Description | Pricing | Funding | Shipping | Payment | Local Info

Line Item Number: 0001 Contract Type: **Change** FFP IDC Type: N/A Hand Carry: ☐

NSN: **Search** [] CLIN Type: ☒ Priced ☐ Info Only

Description: services

Extended Description: []

Quantity: 1.00 Unit Price: 300,000.00 Line Item Cost: 300,000.00

Item Calculation: [] X

Unit of Issue: Lump Sum Options: [] Opt #: [] Cost Constraint: NTE

Stepladder Pricing: ☐ Test Type: No Test ☐ Exhibit ☐ Include Sublines

Template: FFP N/A - Default

Global Chg... Test Info **Delivery** Copy

CLIN Add Insert

SubCLIN Add Insert Delete Associate OK Cancel



Delivery Schedule in v4.2



Delivery Schedule [Read-Only]

Line Item Information

Number: 0001 Total Quantity: 1500

Description: widgets

Sort by: ☒ Date ☐ Location

Date	Quantity	Location
27-Apr-2001	500.00	1 CONS/CC
27-Apr-2001	500.00	15 CONS/LGC
18-May-2001	500.00	1 CONS/CC

Buttons: Add, **Delivery**, POP, Change, Copy, Delete, View, OK, Cancel

Delivery Schedule

Line Item Information

Number: 0001 Total Quantity: 1

Description: services

Sort by: ☒ Date ☐ Location

Delivery Date: 13-Apr-2001 or: ()

Quantity: 1.00

Address:

CODE: F44600

1 CONS/CC

Buttons: OK, Cancel, Details..., Delete

- Add as many Deliveries (Quantities, Dates, and Addresses) as Required
- Click on **Delivery** or **POP** button; the **Delivery** window opens and select and/or input data



Option



- Line Items are identified as Blank, Option or Exercised Option instead of Period - Base or Option
- **“Option”** CLINs identified in printed documents. The word **“Option”** or **“Exercised Option ”** is cited below the CLIN in the document



Option in v4.1x



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: T&M IDC Type: N/A Hand Carry: ☐

Delivery Date: 18-Apr-2002 CLIN Type: ☒ Priced ☐ Info Only

Description: stuff

Extended Description:

Item Calculation: Est. Quantity: 100.00 Unit Price: 300.00 Line Item Cost: 30,000.00

Period of Performance: Start Date: End Date: Period: ☐ Base ☒ Option Opt #: Cost Constraint:

Unit of Issue: Each Test Type: No Test ☐ Exhibit ☐ Include Sublines

Stepladder Pricing: ☐

Global Chg
Test Info
Copy
CLIN
Add
Insert
SubCLIN
Add
Insert
Delete
Associate
OK
Cancel



Option in v4.2



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail Modifications

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: **Change** FFP IDC Type: N/A Hand Carry: ☐

NSN: **Search** CLIN Type: ☒ Priced ☐ Info Only

Description: GLASSES

Extended Description:

	Quantity	Unit Price	Line Item Cost
Item Information	1,000.00	150.00	150,000.00
Amount of Mod.	0.00	0.00	0.00
New Totals	1,000.00	150.00	150,000.00

Unit of Issue: Pair Options: **Option** Opt #: Cost Constraint:

Stepladder Pricing: ☐ Test Type: No Test ☐ Include Sublines

Template: FFP N/A - Default

Global Chg
Test Info
Delivery
CLIN
Add
Insert
SubCLIN
Add
Insert
Delete
Associate
OK
Cancel



Option Does Not Print in v4.1x



Microsoft Word - Document in Commercial Contract Award - DABT10-01-C-0100

File Edit View Insert Format Tools Table Window Help

Normal Times New Roman 10 B I U

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0001	Uniforms FFP	100.00	Each	\$100.00	\$10,000.00
				NET AMT	\$10,000.00
	ACRN AA Funded Amount				\$10,000.00

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0002	Uniforms FFP	100.00	Each	\$100.00	\$10,000.00
				NET AMT	\$10,000.00

Page 2 Sec 2 2/3 At Ln Col REC TRK EXT OVR WPH

Ready January 22, 2001 7:35 PM

Start Jen... Acq... Mic... Pro... PD... W Mic... 7:35 PM



Option Prints in v4.2



Print Preview - pd2269.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

100% Close

N00025-02-C-0007
U00001
Page 3 of 6

ITEM NO	SUPPLIES/SERVICES	MAX QUANTITY	UNIT	UNIT PRICE	MAX AMOUNT
0003		1	Lump Sum	\$200,000.00	\$200,000.00 NTE
OPTION	Services FFP				
MAX NET AMT					\$200,000.00
Funded Amount					\$0.00
FOB: Destination					

ITEM NO	SUPPLIES/SERVICES	MAX QUANTITY	UNIT	UNIT PRICE	MAX AMOUNT
0004		1	Lump Sum	\$200,000.00	\$200,000.00 NTE
EXERCISED OPTION	Services FFP				
MAX NET AMT					\$200,000.00
Funded Amount					\$0.00



“EST” and “NSP”



- “EST” and “NSP” displayed when chosen as Cost Constraint
- “EST” appears next to line item Costs
- Only “NSP” appears in the line item **Total Cost** column



“EST” in v4.2



Print Preview - pd235.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

100% Close

N00025-01-C-0004

Page 2 of 7

Section B - Supplies or Services and Prices

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0001		1,000	Each	\$25.00	\$25,000.00 EST
	Boat FFP				
				NET AMT	\$25,000.00 (EST.)
	ACRN AA Funded Amount				\$25,000.00
0002		1,000	Each	\$25.00	\$25,000.00
	Boat FFP				
				NET AMT	\$25,000.00
	ACRN AB Funded Amount				\$25,000.00
0003		1,000	Each	\$250.00	\$250,000.00 EST
	Boat FFP				

Page 2 Sec 2 2/6 At Ln Col REC TRK EXT OVR WPH

Start Procurement Desktop - De... Microsoft PowerPoint - [4.2... Print Preview - pd235...

2:05 PM



"NSP" in v4.2



W Print Preview - pd235.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

100% Close

N00025-01-C-0004

Page 3 of 3

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT NSP
000301	boat, jet black FFP 500 each				
NET AMT					\$0.00
Funded Amount					\$0.00
ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT NSP
000302	boat, royal blue FFP 500 each				
NET AMT					\$0.00
Funded Amount					\$0.00

Page 3 Sec 2 3/6 At Ln Col REC TRK EXT OVR WPH

Start Procurement Desktop - De... Microsoft PowerPoint - [4.2... W Print Preview - pd235... 2:08 PM



NAICS in v4.2



- NAICS under the Description Tab

Line Item Detail - [Read Only]

Description | Pricing | Funding | Shipping | Payment | Local Info

Line Item Number: 0001 services Global Chg...

Add Manufacturer:

Manufacturer Part Number:

Vendor Part Number:

Prod / Cat Number: Cognizance Sym:

Drawing Number: Media/Status CD:

Spec. Number: Piece Number:

Serial Number: Model Number:

Brand Name/Sole Source: SMIC: Color:

Size: Signal CD:

Suggested Contract Vehicle/GSA Schedule:

Project: FSC: WSC:

PROG: SIC:

Execution Method: Date: NAICS:

Inspection/Acceptance OK Cancel



IDC Minimum/Maximum Order Constraints



- **Constraints** button under the Pricing Tab - Line Item Specific
- Document Level under Document Classification on the menu bar
- Add, change, delete, view and print the Min/ Max order quantity AND monetary amount
- Classify order constraints as Hard (error) or Soft (warning)
 - Warnings allow you to exceed constraints



Pricing Tab

IDC Order Constraints in v4.2 - Line Item



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 widgets Global Chg...

Base Fee Min Fee Gov't Share Above Targ Cost

Award Fee Max Fee Gov't Share Below Targ Cost

Fixed Fee Target Profit/Fee Max Cost

Ceiling Price Target Profit % Tar

Max Qty 1,000.00 Ceiling % Targ

Unit Price 50.00 PTA Cost Ceiling

Variation in Qty (+) % PTA Profit

Variation in Qty (-) % PTA Profit %

Constraints...

Definitization

☒ Definitized ☐ Undefined ☐ Partial

Small Purchase Award Release PO/DO Mod

Line Item IDC Constraints

Line Item

Minimum Maximum

Line Item Quantity:

Line Item Monetary Amount:

Order

Minimum Maximum

Order Quantity:

Constraint Type: ☐ Hard ☒ Soft

Order Monetary Amount:

Constraint Type: ☐ Hard ☒ Soft

OK Cancel

AF team Outbox Trash DCMA Inbox exhibits

Ready January 24, 2001 2:15 PM

Start Procurement Desktop... Microsoft PowerPoint - [4.2...]

3:32 PM



IDC Order Constraints in v4.2 Document Level



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Small F

Items

1. CONTR
N00025-1

4. REQUI

6. ISSUED
NAVAL

9. CONTR
AMERI

Detail

Document Classification

Solicitation Type

☐ RFQ

☐ RFP

☐ IFB

Contract Category

☐ Supply

☐ Service

☐ R&D

☐ Construction/A&E

Contract Sub-Category:

Pricing Structure:

Document Format: UCF

IDC Constraints

	Minimum	Maximum
Contract Quantity:	<input type="text"/>	<input type="text"/>
Contract Amount:	<input type="text"/>	<input type="text"/>
Order Quantity:	<input type="text"/>	<input type="text"/>
Constraint Type:	<input type="radio"/> Hard	<input checked="" type="radio"/> Soft
Order Amount:	<input type="text"/>	<input type="text"/>
Constraint Type:	<input type="radio"/> Hard	<input checked="" type="radio"/> Soft

Ordering Period

Start Date: End Date:

Electronic Funds Transfer (EFT)

EFT ☒

Excl. Reason:

OK Cancel



Funding Tab



- LOA Template
- LOA Steps
- Search and Copy
- ACRN Enhancements



LOA Template



- Funding Strip only shows Lines of Accounting (LOA) in document – duplicate LOAs not allowed
- Segmented LOA with search and copy capability
 - Different for each service
 - Includes one miscellaneous LOA with string of 109 alphanumeric characters
- Manual ACRN Assignment
- Contract ACRN assigned when LOA is selected
- Funding amounts change automatically from the Line Item Detail
- Deletion/Replacement of LOA on released document is not allowed. When issuing a modification, the original LOA funding amount can be changed to zero and a new LOA and amount added, if appropriate



LOA Steps



- In Line Item Detail window, go to Funding Tab and click “add” button.
- The Funding Sources window opens; select New or Search
- The LOA search window opens; go to Search Format and click on Branch of Service.
- Click on Search Button and LOAs appear; you can now select or copy and change. Click OK and the ACRN appears, which can be edited.
- If you need to use the same LOA on a contract, use the scroll down button on the Funding Sources window and select the appropriate LOA.



Lines of Accounting in v4.1x

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Funding Sources

Line Item Information

Number 0001 Description Tanks

Total Cost \$1,000,000.00

Funding Strip [dropdown] Cost Code 000000000000 New...

Amount 1,000,000.00 Fund ACRN [dropdown] TAC [dropdown]

Job Order Expiration Dt Quantity Funded Amt TAC Amount FMS Case

Total Qty: 0.00 Total \$:

Add... Change...

Total Funded Amt

OK Cancel

New Funding Source

New Funding Source

Funding Strip E930938U2Q0329R509309RFJF9302029R592020920FKJ

OK Cancel

OK Cancel

F44600-01-A-0002 06 DEC 00 17:42
Brenda jmass
Blanket Purchase Master Agreement

F44600-01-C-0004 04 DEC 00 10:26
For Lorie jmass
Commercial Contract Award

Released

Ready January 22, 2001 7:05 PM

Start Jen... Acq... Mic... Pro... PD-... W Mic... 7:05 PM



Segmented Lines of Accounting v4.2 - Template



- Layout to accommodate each service

Funding Source - New

Funding Format:
Army

Funding Source

Department Code (2):	21	Issuing Department Code (2):	
Fiscal Year (4):		Treasury Account Number (4):	
Subhead / Limit (4):		Accounting Station Number (8):	
Program Year (1):		Operating Agency Code (2):	
Allotment Serial Number (4):		Project Account (11):	
Element Of Resource (4):		Standard Document Number (14):	
Account Processing Code (6):		AAA / Station Number (8):	
CPN Recipient / Organization (6):			

Display:

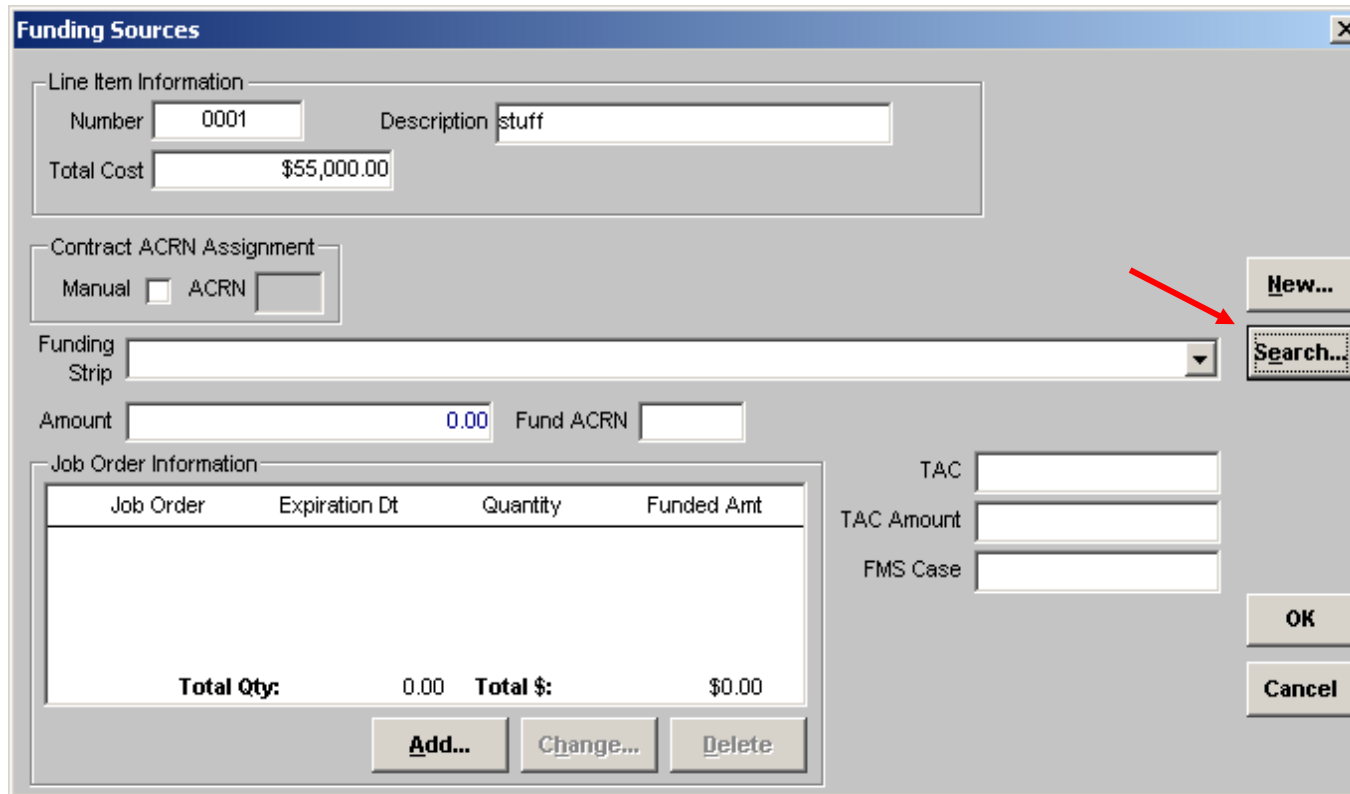
OK Cancel



Search and Copy



- Search and Copy capability to find and edit existing LOAs
- Select branch of Service format and search for specific LOAs
 - Search document or system
 - Search by segmented field using % wild card
- Copy and change appropriate block(s) without having to input an entire LOA
- **Big Time Saver** when inputting annual appropriations and only the number of the year changes





ACRN Enhancements



- ACRNs are assigned and visible when line of accounting is selected, not upon generation as in v4.1x
- ACRNs can now be assigned manually

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Funding Sources

Line Item Information

Number 0001 Description Things

Total Cost \$30.56

Contract ACRN Assignment

Manual ☐ ACRN ☐ Funding Strip ☐ New...

Amount

Job Order Information

Job Order

Total Qty

Funding Source - New

Funding Format: Army

Funding Source

Department Code (2): 21 Issuing Department Code (2): 09

Fiscal Year (4): 2001 Treasury Account Number (4): 4342

Subhead / Limit (4): 1234 Accounting Station Number (8): 45354242

Program Year (1): 1 Operating Agency Code (2): 32

Allotment Serial Number (4): 3453 Project Account (11): 34364364363

Element Of Resource (4): 5346 Standard Document Number (14): DABT1101D12345

Account Processing Code (6): 534645 AAA / Station Number (8): 84939382

CPN Recipient / Organization (6): 348424

Display:

21 09 2001 4342 1234 45354242 1 32 3453 34364364363 5346 DABT1101D12345 534645 84939382 948424

OK Cancel

AF team Outlook Trash DCMA Inbox

Ready January 24, 2001 12:57 PM

Start Procurement Desktop... Microsoft PowerPoint - [4.2...]



Shipping Tab



- Correctly displays and prints delivery information for FOB points entered on the Shipping tab
- The FOB column has been removed from procurement documents and the information now Displays below the Ship To Address
- Applies to all procurement documents and EDA documents



Pre-Award/Award



- PIIN Enhancements – *DoDAANs, PIINs Editable*
- Address Layouts
- KO E-Mail Addresses
- Clauses
- Attachment Dates
- Agreements
- Confirming Orders
- Vendor Quotes



PIIN Enhancements in v4.2



- Multiple DODAANs available per user; Default set in Preferences

Desktop - Defense

File Edit Procurement Reference Utilities Window Help

Preferences

General Password Notification Req. Addr. Other Addr.

General

User ID: lorie42

☒ Confirm to exit

☒ Save configuration on exit

Catalog Name:

Procurement

Auto Ordering

Preference:

☐ Payment Request Auto Validation

☒ Auto Sort Document

Mail

☒ Notification for new items in Inbox

Check for new Mail every minutes

Send new Mail every minutes

Forward Mail to:

Disable logging: ☒

Log File:

Debug: ☐ Limit: (Kb)

Default DoDAAN

DoDAAN	Call/Order #	
14417R	R1	<input type="checkbox"/> Default
N00025	ZZ	<input checked="" type="checkbox"/> Default

OK Cancel



PIIN Enhancements in v4.2

Serial Range and DoDAAN



- Select different DoDAANs and/or serial ranges
- Select Format with PIIN Selection
- PIIN serial ranges can be established by the SA for different organization codes or commodities

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Items 1 - 10 Items 11 - 15 Items 16 - 20 Clauses

AWARD / CONTRACT

1. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 350)

RATING PAGE

2. CONTRACT (Proc. Inst. Identifier)

PROJECT

5. ISSUED BY

COI

7. NAME AND ADDRESS OF C

Create New Award / Contract

Number: N00025 - 02 - C - 0005

PIIN Serial Range

Description: Award / Contract

Format ID: UCF

OK Cancel

Create New Award / Contract

Number: N00025 - 02 - C - 0008

PIIN Serial Range

Description:

Code 02	0001 to 0100
Code 02A	1000 to 1100
Code 02B	2000 to 2100



PIIN Enhancements in v4.2 - Change PIIN Prior to Release



- Change Award PIIN prior to Release on unapproved document
- Edit description

The screenshot displays the 'Procurement Desktop - Defense' application interface. The 'Document Rename/Renumber...' dialog box is open, showing the following details:

- Title:** Rename/Renumber for Document: DABT32-01-C-0001
- Number:** DABT32
- PIIN Serial Range:** - 01 - C - 0001
- Description:** Award / Contract

The background application window shows a list of documents with columns for Number, Description, Date, and Type. The 'Document Rename/Renumber...' option is highlighted in the left-hand menu.



Address Layouts



- NOTE: The issuing office address of an SF30 does not pull from the award document, but from the users' preferences. If the user has no default address specified, the block will be left blank for the address to be manually added.
- New SA task allows for the creation of address layout for any country, FPO/APO
- Displays and prints the address layout for countries specified in the new task, establishes a default format for the site



Address Layouts in v4.2 - Details



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Basic Agreement

Items 1 - 10

AWARD / CONTRACT

2. CONTRACT (Procurement)
N00025-01-H-0001

5. ISSUED BY
NAVAL FACILITIES

Address Layout Details

Layout Name: Standard (U.S.)

Standard (U.S.)
AMERICAN MA BOSNIA ADDRESS LAYOUT
KRIS CASEY N. WALES ADDRESS LAYOUT
4114 LEGATO GERMANY ADDRESS LAYOUT
FAIRFAX VA APO/FPO ADDRESS LAYOUT

Details... Delete

7. NAME AND ADDRESS OF CONTRACTOR (No., street, city, county, State and Zip Code)
AMERICAN MANAGEMENT SYSTEMS, INC.

8. DELIVERY
☐ FOB ORIGIN ☒ OTHER (See Below)

9. DISCOUNT FOR PROMPT PAYMENT
NET

10. SUBMIT INVOICES (4 copies unless otherwise specified)
Submit 4 copies to the address
shown in: Block 5

CODE: FACILITY CODE

Details... Add



CO E-Mail Addresses in v4.2



- CO's e-mail address and phone number will print out under his/her name in contract

Print Preview - pd26E.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

150% Close

ACCEPTANCE. THE CONTRACTOR HEREBY ACCEPTS THE OFFER REPRESENTED BY THE NUMBER AS IT MAY PREVIOUSLY HAVE BEEN OR IS NOW MODIFIED, SUBJECT TO ALL OF THE CONDITIONS SET FORTH, AND AGREES TO PERFORM THE SAME.

NAME OF CONTRACTOR SIGNATURE TYPED NAME AND TITLE

☐ If this box is marked, supplier must sign Acceptance and return the following number of copies:

17. ACCOUNTING AND APPROPRIATION DATA/ LOCAL USE

See Schedule

18. ITEM NO.	19. SCHEDULE OF SUPPLIES/ SERVICES	20. QUANTITY ORDERED/ ACCEPTED*	21. UNIT	22. UNIT PRICE
CONFIRMING ORDER - DO NOT DUPLICATE				
SEE SCHEDULE				
* If quantity accepted by the Government is same as quantity ordered, indicate by X. If different, enter actual quantity accepted below quantity ordered and encircle.		24. UNITED STATES OF AMERICA TEL:202-685-9150 EMAIL:lorie.higgins@navfac.navy.mil BY:Lorie A. Higgins		
26. QUANTITY IN COLUMN 20 HAS BEEN <input type="checkbox"/> INSPECTED <input type="checkbox"/> RECEIVED <input type="checkbox"/> ACCEPTED, AND CONFORMS TO THE CONTRACT EXCEPT AS NOTED		27. SHIP NO. <input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL		
DATE		28. DO VOUCHER NO. 32. PAID BY		
SIGNATURE OF AUTHORIZED GOVT. REP.		29. PAYMENT		

LORIE HIGGINS
CONTRACTING / ORDERING OFFICER



Clauses



- **Sort - Preferences override on Generation**
- **Moving Clauses/Text within the Clauses Tab**

Right-click the clause or text placeholder and then click Select Text. Select the area to place the text and right-click. Select Insert Text Selection.

Note: To keep the text in the order that it was moved, uncheck the box marked Sort by Default on the Document Generation Options window. Sort by Default arranges all clauses and text in predefined order. To review the predefined order, search for Clauses in PD² Advisor.

- **Local Clauses are in full text**



Attachment Dates in v4.2



- Can change attachment date in **Section J**

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Contract Mod - N00025-02-C-1002-U00002

SF30 1-10 SF30 13-16 SF26 1-10 SF26 11-15 SF26 16-20 Clauses

Clause/CLIN Number Editable Required Incorporation

Clause Title/CLIN Description

SECTION: J - List of Documents, Exhibits and Other Attachments

Table of Contents Editable ☐ Not Included

Classification: Special Instructions:

Free-Form Text: Table of Contents in Contract Mod - N00025-02-C - pd21AF.rtf

File Edit View Insert Format Tools Table Window Help

Normal Times New Roman 12 B I U

Exhibit/Attachment Table of Contents

DOCUMENT TYPE	DESCRIPTION	PAGES	DATE
Attachment 1	Contract Security Classification Specification		16-JAN-2002

Delete Add Clause



Agreements



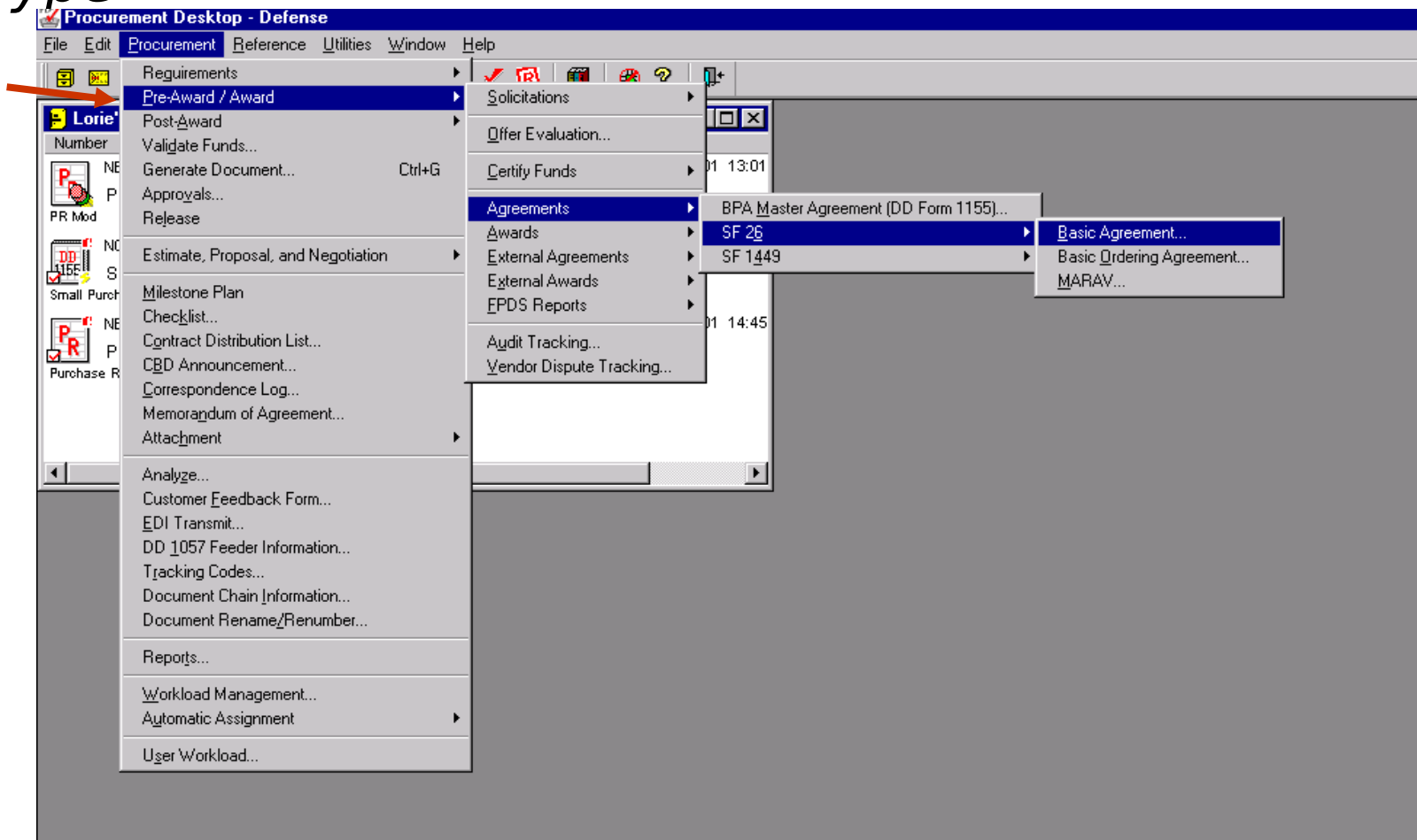
- Create Basic Agreements (BAs), Basic Ordering Agreements (BOAs)
 - With or without line items, quantities and/or prices
 - Null values are acceptable
 - External agreement capability
- Create Telecom Service Agreements (TSAs) to support electronic Inquiry/Quote/Order process for telecom authorizations
- No functionality in other versions of PD²



BAS in v4.2



Procurement → Pre-Award → Agreements → *Contract Type*





BAS in v4.2



- Procurement → Post Award → Agreements → *Award Type*

Procurement Desktop - Defense

File Edit **Procurement** Reference Utilities Window Help

Requirements
Pre-Award / Award
Post-Award
Validate Funds...
Generate Document... Ctrl+G
Approvals...
Release
Estimate, Proposal, and Negotiation
Milestone Plan
Checklist...
Contract Distribution List...
CBD Announcement...
Correspondence Log...
Memorandum of Agreement...
Attachment
Analyze...
Customer Feedback Form...
EDI Transmit...
DD 1057 Feeder Information...
Tracking Codes...
Document Chain Information...
Document Rename/Renumber...
Reports...
Workload Management...
Automatic Assignment
User Workload...

Modification
Modification Linking...
Multiple Contracts Modification...
Orders
Agreement Orders/Contracts
BPA Call...
Imprest Fund Management...
Award Status...
Agreement Status...
Vendor Performance...
Audit Tracking...
Vendor Dispute Tracking...
Closeout
Termination
No Cost Cancellation
Agreement Discontinuation
Contract Data Cover Sheet...
Delivery
Discrepancy Report
Payment Request
Payment
Tracking Source...

DD 1155
SF 26
SF 1449
Telecommunications Order

Lorie's Cabinet

Number	Description	User	Date	Type	
	Small Purchase				28 M, higg
	Folder				
SF 26	N00025-01-H-0001				28 M, higg
	Basic Agreement (SF 26)				higg
	Basic Agreement (SF 26)				
P	NEW REQN-0001				28 M, higg
	PP Mod				



BA/BOA(s) IN v4.2 - Null Values



SEE SCHEDULE								
15G. TOTAL AMOUNT OF CONTRACT								\$0.00
16. TABLE OF CONTENTS								
(X)	SEC.	DESCRIPTION	PAGE(S)	(X)	SEC.	DESCRIPTION	PAGE(S)	
PART I - THE SCHEDULE				PART II - CONTRACT CLAUSES				
X	A	SOLICITATION/ CONTRACT FORM	1 - 2	I		CONTRACT CLAUSES		
X	B	SUPPLIES OR SERVICES AND PRICES/ COSTS	3	PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS				
	C	DESCRIPTION/ SPECS./ WORK STATEMENT		J		LIST OF ATTACHMENTS		
	D	PACKAGING AND MARKING		PART IV - REPRESENTATIONS AND INSTRUCTIONS				
X	E	INSPECTION AND ACCEPTANCE	4	K		REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS		
X	F	DELIVERIES OR PERFORMANCE	5	L		INSTRS., CONDS., AND NOTICES TO OFFERORS		
	G	CONTRACT ADMINISTRATION DATA		M		EVALUATION FACTORS FOR AWARD		
	H	SPECIAL CONTRACT REQUIREMENTS						
CONTRACTING OFFICER WILL COMPLETE ITEM 17 OR 18 AS APPLICABLE								
17. <input checked="" type="checkbox"/> CONTRACTOR'S NEGOTIATED AGREEMENT Contractor is required to sign this document and return copies to issuing office. Contractor agrees to furnish and deliver all items or perform all the services set forth or otherwise identified above and on any continuation sheet for the consideration stated herein. The rights and obligations of the parties to this contract shall be subject to and governed by the following documents: (a) the award contract (b) the solicitation, if any, and (c) such provisions, representations, certifications, and specifications, as are attached or incorporated by reference herein. (Attachments are listed herein.)				18. <input type="checkbox"/> AWARD (Contractor is not required to sign this document.) Your offer on Solicitation Number _____ REF: Vendor price list of \$/M01 including the additions or changes made by you which additions or changes are set forth in full above, is hereby accepted as to the items listed above and on any continuation sheet. This award consummates the contract which consists of the following documents: (a) the Government's solicitation and your offer, and (b) this award contract. No further contractual documents necessary.				
19A. NAME AND TITLE OF SIGNER (Type or print)				20A. NAME AND TITLE OF CONTRACTING OFFICER LORIE A. HIGGINS / CONTRACTING OFFICER TEL: 202-685-9150 EMAIL: lorie.higgins@navfac.navy.mil				
19B. NAME OF CONTRACTOR		19C. DATE SIGNED		20B. UNITED STATES OF AMERICA		20C. DATE SIGNED		
BY _____ (Signature of person authorized to sign)				BY LORIE HIGGINS (Signature of Contracting Officer)		28-Mar-2001		

NEN 7540-01-132-8049

25-107

STANDARD FORM 24 (REV. 4-83)



BA/BOA(s) in v4.2 - Null Values (cont'd)



File Edit View Insert Format Tools Table Window Help

100% Close ?

1 2 3 4 5 6 7

N00025-01-H-0001

Page 3 of 5

Section B - Supplies or Services and Prices

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0001	Services for consulting FFP				
				NET AMT	\$0.00
	Funded Amount				\$0.00



Confirming Orders in v4.2



- Option to Add Phrase, “CONFIRMING ORDER – DO NOT DUPLICATE” on DD1155 and SF1449 Purchase Orders

The screenshot shows the 'Procurement Desktop - Defense' application window. The 'Document Options' menu is open, and the 'Confirming Order' option is highlighted with a red arrow. The main form displays details for a purchase order, including contract number N00025-01-P-0003, date of order 2001 Mar 29, and contractor AMERICAN MANAGEMENT SYSTEMS, INC. The 'Confirming Order' option is located at the bottom of the 'Document Options' menu.

The screenshot shows the 'Procurement Desktop - Defense' application window. The 'Document Options' menu is open, and the 'Confirming Order' option is checked with a red arrow. The main form displays details for a purchase order, including contract number N00025-01-P-0003, date of order 2001 Mar 29, and contractor AMERICAN MANAGEMENT SYSTEMS, INC. The 'Confirming Order' option is located at the bottom of the 'Document Options' menu.



Vendor Quotes in v4.2



- Enter, edit or delete vendor quote number in Offer Evaluation Module and on award forms

Procurement Desktop - Defense

File Edit Offer Evaluation Window Help

Offer Evaluation - TEST-AMS-1-0002

Quote Sheet

Vendor Name: 20TH CENTURY MACHINE CO BV
CAG: SH541 Size: ☐ Large ☐ Small
Contact Name: GUS DABRINGHAUS
Contact Phone: (810) 752-0060
Remarks:
Quote Number: AMS Quote 120394 dtd 4/26/02
F.O.B. ☐ Dest. ☐ Other ☐ Origin

Payment Terms:
Price Guarantee Days: from 26-Apr-2002

Vendor:
SH541 - 20TH CENTURY
GUS DABRINGHAUS
ARMADA MI 48005-4030

Line Item	Description	Qty.	Unit of Issue	Unit Price	Credit Amount	Trade Disc. (%)	Total Cost	Delivery Date
0001	Services		Lump					ADC
Ext. Desc.								
0002	Services		Lump					ADC
Ext. Desc.								
0003	Services		Lump					ADC
Ext. Desc.								

Line Item
Create Attach Delete

OK Cancel

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Basic Agreement (SF 26) - N 00025-01-H-0001

Items 1 - 10 Items 11 - 15 Items 16 - 20 Clauses

16. TABLE OF CONTENTS

(X)	SEC.	DESCRIPTION	PAGES	(X)	SEC.	DESCRIPTION	PAGES
<input checked="" type="checkbox"/>	A	SOLICITATION/CONTRACT FORM	1 - 1	<input type="checkbox"/>	I	CONTRACT CLAUSES	
<input type="checkbox"/>	B	SUPPLIES OR SERVICES AND PRICES/COSTS		<input type="checkbox"/>	J	LIST OF ATTACHMENTS	
<input type="checkbox"/>	C	DESCRIPTION / SPECS. / WORK STATEMENT		<input type="checkbox"/>	K	REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS	
<input type="checkbox"/>	D	PACKAGING AND MARKING		<input type="checkbox"/>	L	INSTRS., CONDS., AND NOTICES TO OFFERORS	
<input type="checkbox"/>	E	INSPECTION AND ACCEPTANCE		<input type="checkbox"/>	M	EVALUATION FACTORS FOR AWARD	
<input type="checkbox"/>	F	DELIVERIES AND PERFORMANCE					
<input type="checkbox"/>	G	CONTRACT ADMINISTRATION DATA					
<input type="checkbox"/>	H	SPECIAL CONTRACT REQUIREMENTS					

17. [C] CONTRACTOR'S NEGOTIATED AGREEMENT [C] AWARD (Contractor is not required to sign this document)

(Contractor is required to sign this document and return copies to issuing office.) 2

REF: [Vendor price list quoted 3/15]

including the additions or changes made by you which additions or changes are set forth in full above, is hereby accepted as to the items listed above...

20A. NAME AND TITLE OF CONTRACTING OFFICER



Confirming Orders and Vendor Quotes Referenced on DD Form 1155 in v4.2



Print Preview - p0270.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

100% Close

GARY DUNHILL 123 MAIN ST SUITE 45 BOX 67 RESTON VA 21171		12. DISCOUNT TERMS NET		<input type="checkbox"/> SMALL DISADVANTAGED <input type="checkbox"/> WOMEN-OWNED	
13. MAIL INVOICES TO THE ADDRESS IN BLOCK See Item 6					
14. SHIP TO SEE SCHEDULE		CODE		15. PAYMENT WILL BE MADE BY DFAS-COLUMBUS CENTER DFAS-CO-JNB/BUNKER HILL P.O. BOX 182077 COLUMBUS OH 43218-2077	
CODE		SC1016		MARK ALL PACKAGES AND PAPERS WITH IDENTIFICATION NUMBERS IN BLOCKS 1 AND 2.	
16. DELIVERY/ TYPE CALL OF PURCHASE ORDER		This delivery order call is based on another Govt agency or in accordance with and subject to terms and conditions of above numbered contract.			
X		Reference your quote dated 15-Mar-2001 Furnish the following on terms specified herein. REF: Vendor Quote #Q-350			
ACCEPTANCE. THE CONTRACTOR HEREBY ACCEPTS THE OFFER REPRESENTED BY THE NUMBERED PURCHASE ORDER AS IT MAY PREVIOUSLY HAVE BEEN OR IS NOW MODIFIED, SUBJECT TO ALL OF THE TERMS AND CONDITIONS SET FORTH, AND AGREES TO PERFORM THE SAME.					
NAME OF CONTRACTOR		SIGNATURE		TYPED NAME AND TITLE	
<input type="checkbox"/> If this box is marked, supplier must sign Acceptance and return the following number of copies:				DATE SIGNED (YYYYMMDD)	
17. ACCOUNTING AND APPROPRIATION DATA/ LOCAL USE See Schedule					
18. ITEM NO.		19. SCHEDULE OF SUPPLIES/ SERVICES		20. QUANTITY ORDERED/ ACCEPTED*	
				21. UNIT	
				22. UNIT PRICE	
				23. AMOUNT	
		CONFIRMING ORDER - DO NOT DUPLICATE SEE SCHEDULE			
		24. UNITED STATES OF AMERICA			
		TEL:		25. TOTAL	
		EMAIL:		\$35,000.00	
		BY:		29.	
		CONTRACTING / ORDERING OFFICER		DIFFERENCES	

* If quantity accepted by the Government is same as quantity ordered, indicate by X. If different, enter actual quantity accepted below quantity ordered and encircle.



Indefinite Delivery Contracts



- External Awards and DO/TOs
- IDIQ and DO/TOs
- IDIQ Order Tracking



External Awards



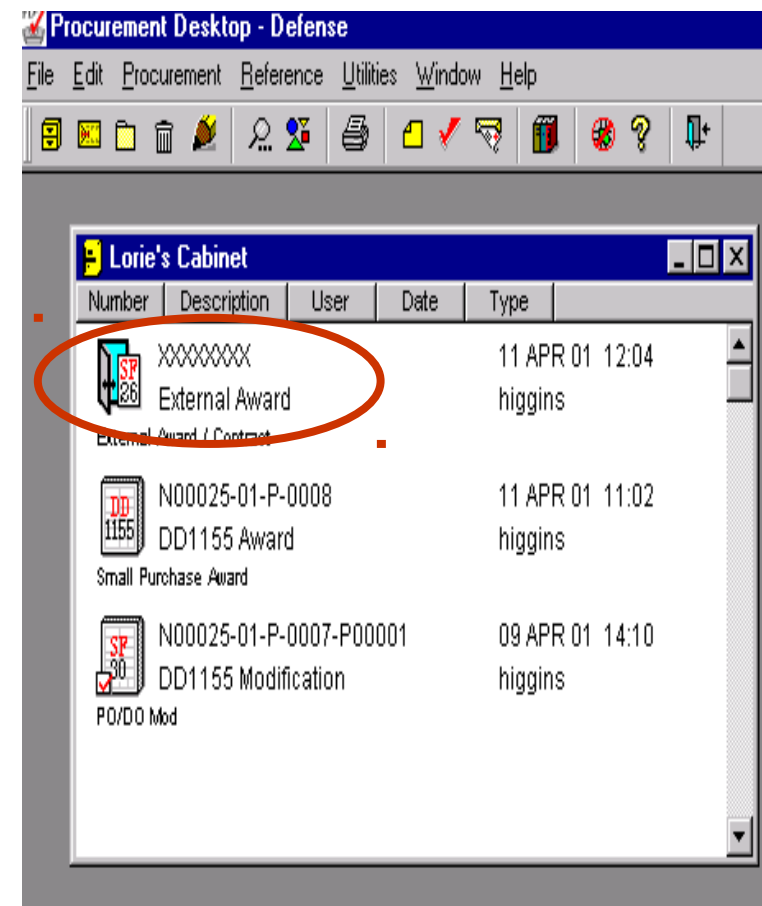
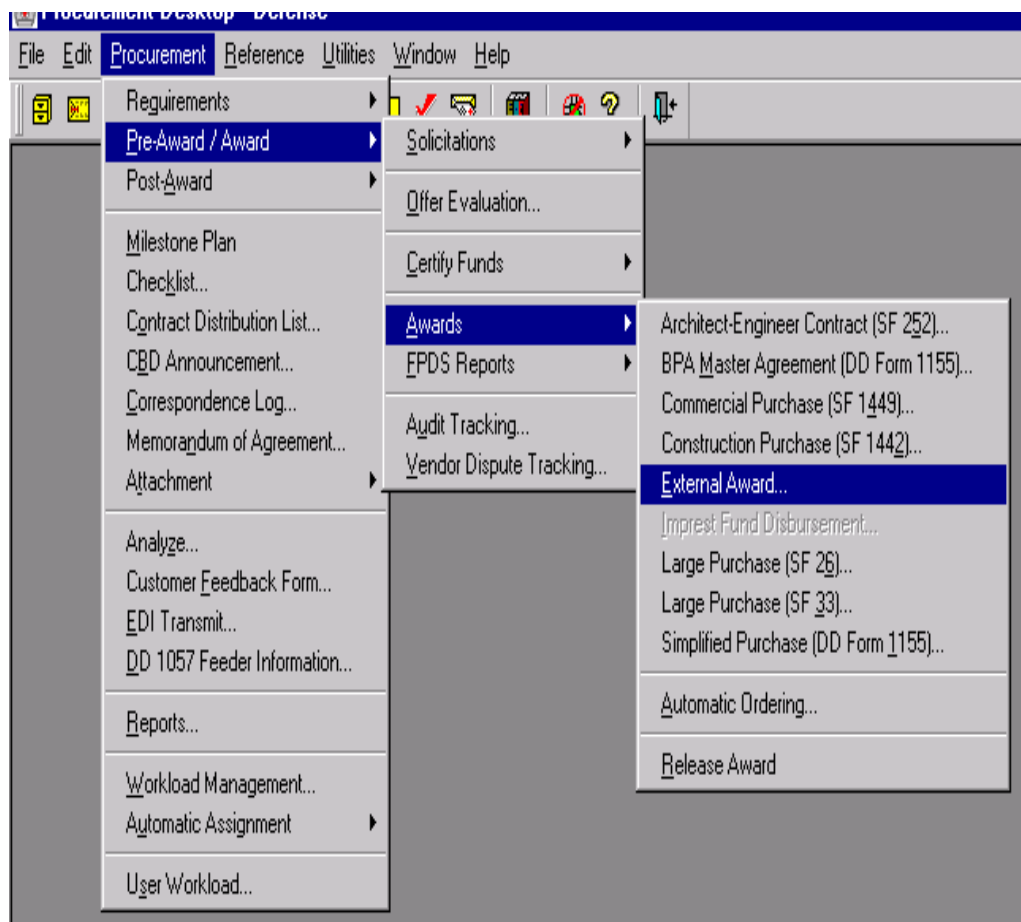
- Create External Awards for all types of forms
 - SF26, SF33, SF252, SF1442, SF1449, and DD1155
 - Common format simplifies data entry
- Create corresponding types of DO/TOs off External Awards
- All other functionalities are the same as v4.1x
 - i.e. cannot do modifications – must un-approve and make changes and re-approve



External Awards in v4.1x



- External Awards in v4.1x limited to the SF 26





External Awards in v4.2



Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

Requirements
Pre-Award / Award
Post-Award
Validate Funds...
Generate Document... Ctrl+G
Approvals...
Release
Estimate, Proposal, and Negotiation
Milestone Plan
Checklist...
Contract Distribution List...
CBD Announcement...
Correspondence Log...
Memorandum of Agreement...
Attachment
Analyze...
Customer Feedback Form...
EDI Transmit...
DD 1057 Feeder Information...
Tracking Codes...
Document Chain Information...
Document Rename/Renumber...
Reports...
Workload Management...
Automatic Assignment
User Workload...

External Awards

Solicitations
Offer Evaluation...
Certify Funds
Agreements
Awards
External Agreements
External Awards
FPDS Reports
Audit Tracking...
Vendor Dispute Tracking

SF 252
SF 1449
SF 1442
SF 20
SF 33
DD 1155

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

External Award (SF 1449) - N00024-91-D-2002

Items 1 - 12 Items 13 - 16 Items 17 - 21 BPA Items Clauses

EXTERNAL AWARD

1. AWARD TYPE
SF 1449 Award

2. DPAS RATING
[]

3. EFFECTIVE DATE
[]

4. DATE OF CONTRACT
[]

5. CONTRACT (Proc. Inst. Ident.) NO.
N00024-91-D-2002

6. REQUISITION/PURCHASE REQUEST/PROJECT NO.
[]

7. ISSUED BY CODE N00024
NAVAL SEA SYSTEMS COMMAND

8. ADMINISTERED BY CODE
[]

See Item 7

Details... Delete

9. NAME AND ADDRESS OF CONTRACTOR CODE: B5205
BAYER CORPORATION

10. DELIVERY
[] FOB ORIGIN [] OTHER (See Below)

11. DISCOUNT FOR PROMPT PAYMENT
[]

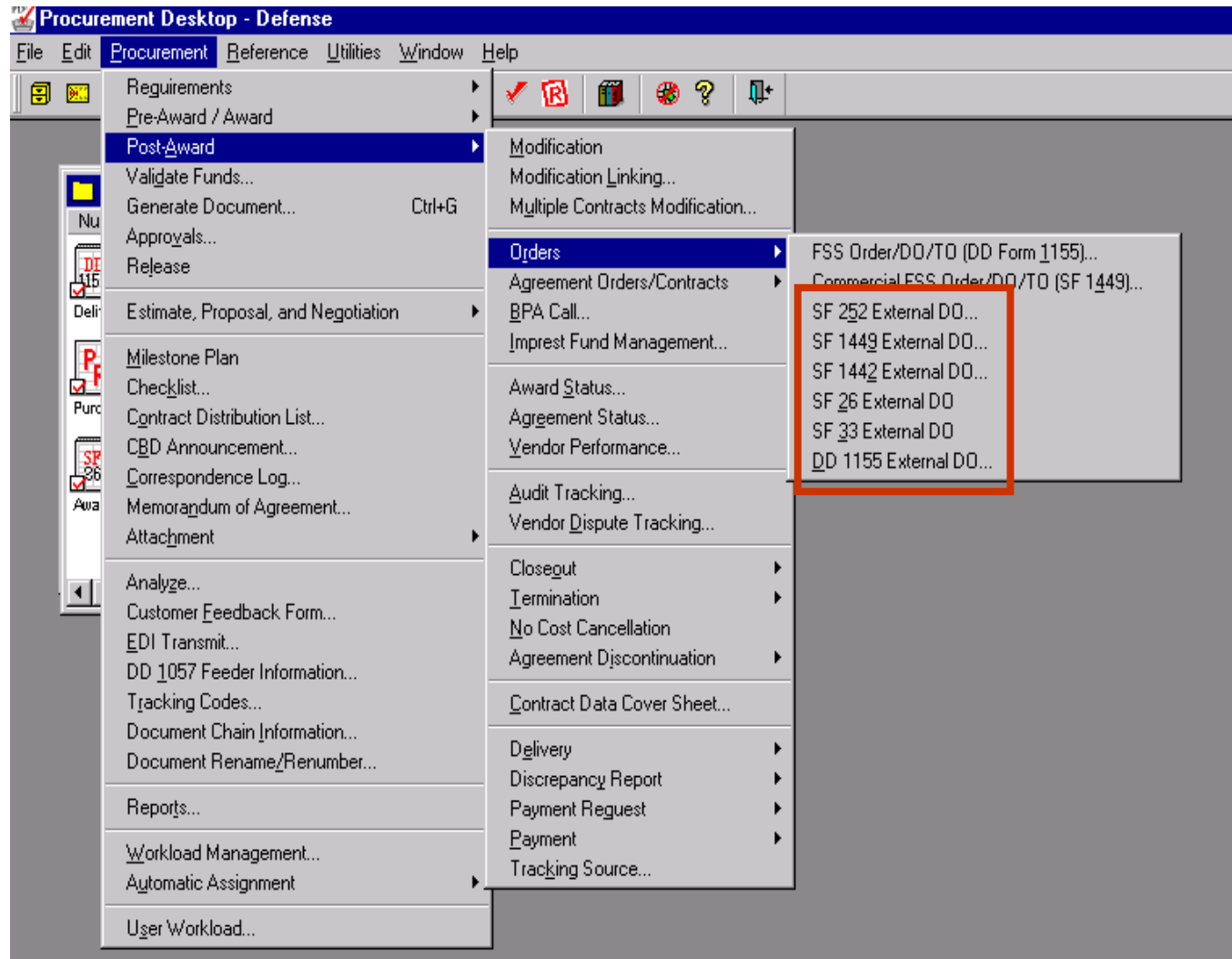
12. SUBMIT INVOICES
Submit [] copies to the address shown in:

Details... Delete

Active Cont... May 1, 2002 5:46 PM



Delivery Orders Against External Awards in v4.2





IDIQ




- Do not have to enter values for quantity/price and/or description or select TBN under Cost Constraint for CLINs in the Line Item Detail
- Solicitations, Amendments, Awards, and Modifications can be approved and released without quantity or cost
- Null values are also acceptable
- Tracks to dollars as constraint
- No work-around required in v4.2 for Cost type contracts



IDIQ Delivery Order Tracking in v4.2x - Matchmaker Screen



**SF**
1442


N00025-01-D-0002
SF1442 Award
Construction Contract Award

Min Qty Min \$ Amt

Max Qty Max \$ Amt

CLIN #	Description	Type
	Remaining Quantity	Unit Cost
	Remaining Cost	
0001	construction work subject to Davis-Bacon FFP	
	2,400,000	1.00

Report

**DD**
1155

N00025-01-D-0002-0002
Delivery/Task Order
Delivery Order

Min Qty Min \$ Amt

Max Qty Max \$ Amt

CLIN #	Description	Type
	Quantity	Cost
	CLIN Price	

OK **Cancel** **Attach**

Tracked to Quantity only. Under 4.1 you had to convert the quantities for lump sum items to get past the PD counter.



IDIQ Delivery Order Tracking in v4.2

CPFF Matchmaker Screen



- Tracks to dollars for cost type contract

Delivery Order (DD 1155) - N00025-01-D-0002-0001

Delivery/Task Order

Contract

N00025-01-D-0002
Award / Contract

Min Qty Min \$ Amt
Max Qty Max \$ Amt

Delivery/Task Order

N00025-01-D-0002-0001
Delivery Order (DD 1155)

Min Qty Min \$ Amt
Max Qty Max \$ Amt

CLIN #	Description	Type
0001	SERVICES	CPFF
	12000	200,000
0003	SERVICES	CPFF
	12000	200,000
0002	SERVICES	CPFF
	12000	200,000

CLIN #	Description	Type
0001	Services	CPFF
	50,000	53,000.00
0002	Services	CPFF
	50,000	53,000.00

Report **OK** **Cancel** **Attach**

Example above - each CLIN has a lump sum cost of \$200,000.00 plus a Fixed Fee of \$12,000.00; for a CLIN total of \$212,000.00. NOTE: For FFP contracts, a work around is still required (i.e. changing contract type to cost after clause generation.)



IDIQ Delivery Order Tracking in v4.2 - CPFF



ITEM NO	SUPPLIES/SERVICES	MAX QUANTITY	UNIT	UNIT PRICE	MAX AMOUNT
0001		UNDEFINED	Lump Sum	UNDEFINED	UNDEFINED
	SERVICES				
	CPFF				
	PURCHASE REQUEST NUMBER: IDCSRVCS				
				MAX COST	\$50,000.00
				FIXED FEE	\$3,000.00
					<hr/>
				TOTAL MAX COST + FEE	\$53,000.00
	ACRN AA Funded Amount				\$53,000.00

ITEM NO	SUPPLIES/SERVICES	MAX QUANTITY	UNIT	UNIT PRICE	MAX AMOUNT
0003		UNDEFINED	Lump Sum	UNDEFINED	UNDEFINED
	SERVICES				
	CPFF				
	PURCHASE REQUEST NUMBER: IDCSRVCS				
				MAX COST	\$50,000.00
				FIXED FEE	\$3,000.00
					<hr/>
				TOTAL MAX COST + FEE	\$53,000.00
	ACRN AA Funded Amount				\$53,000.00

All amounts were captured appropriately when matched



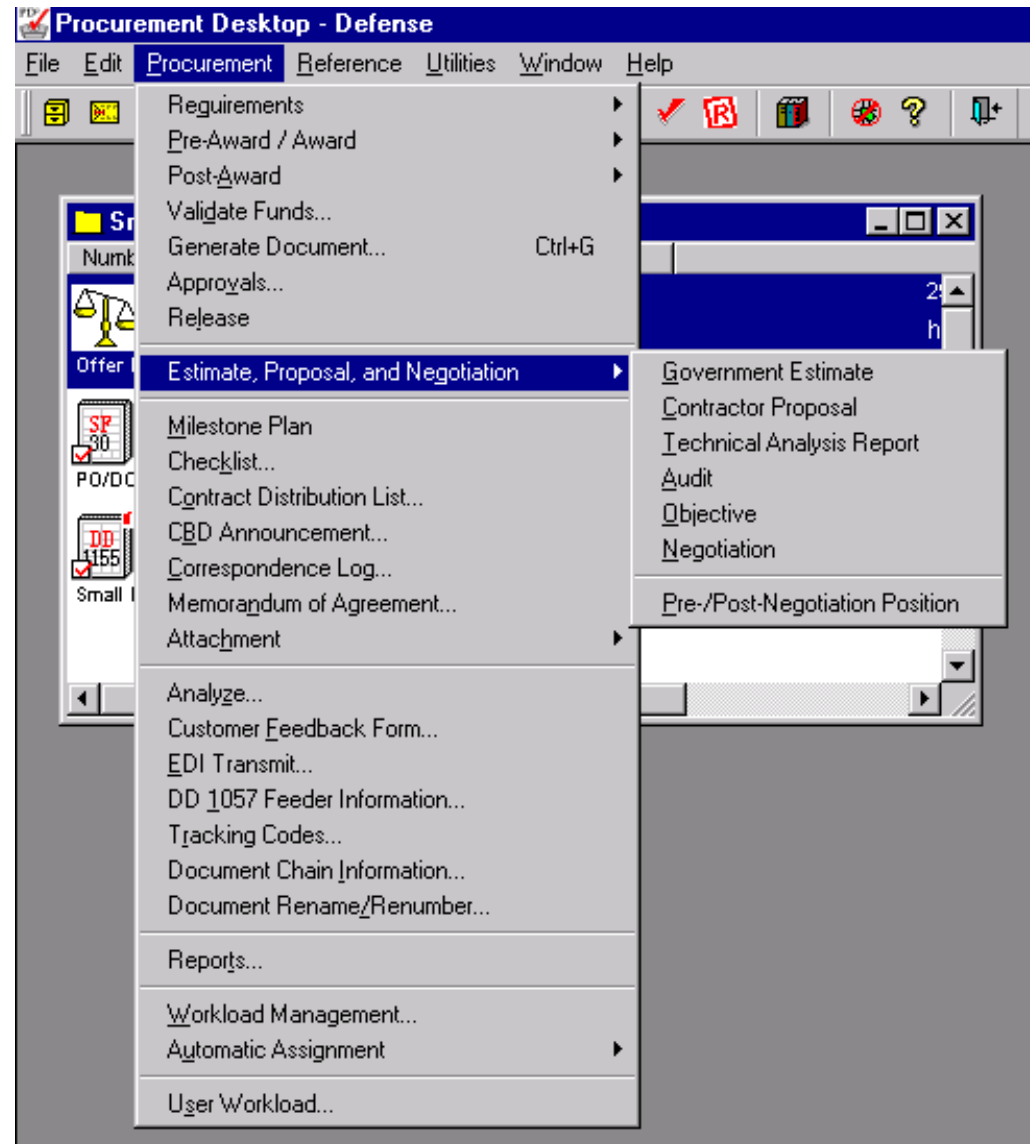
Proposal Negotiation Documentation



- Developed in v4.2 primarily for Modification actions
- Templates are customized by SA for pricing data
- Can create appropriate documents: Government Estimate, Contractor Proposal, Audit, Technical Analysis Report, Government Objective and Government Negotiation
- Can create Pre/Post Negotiation Position
- Information displayed in Requirement Status



Negotiation Documentation in v4.2

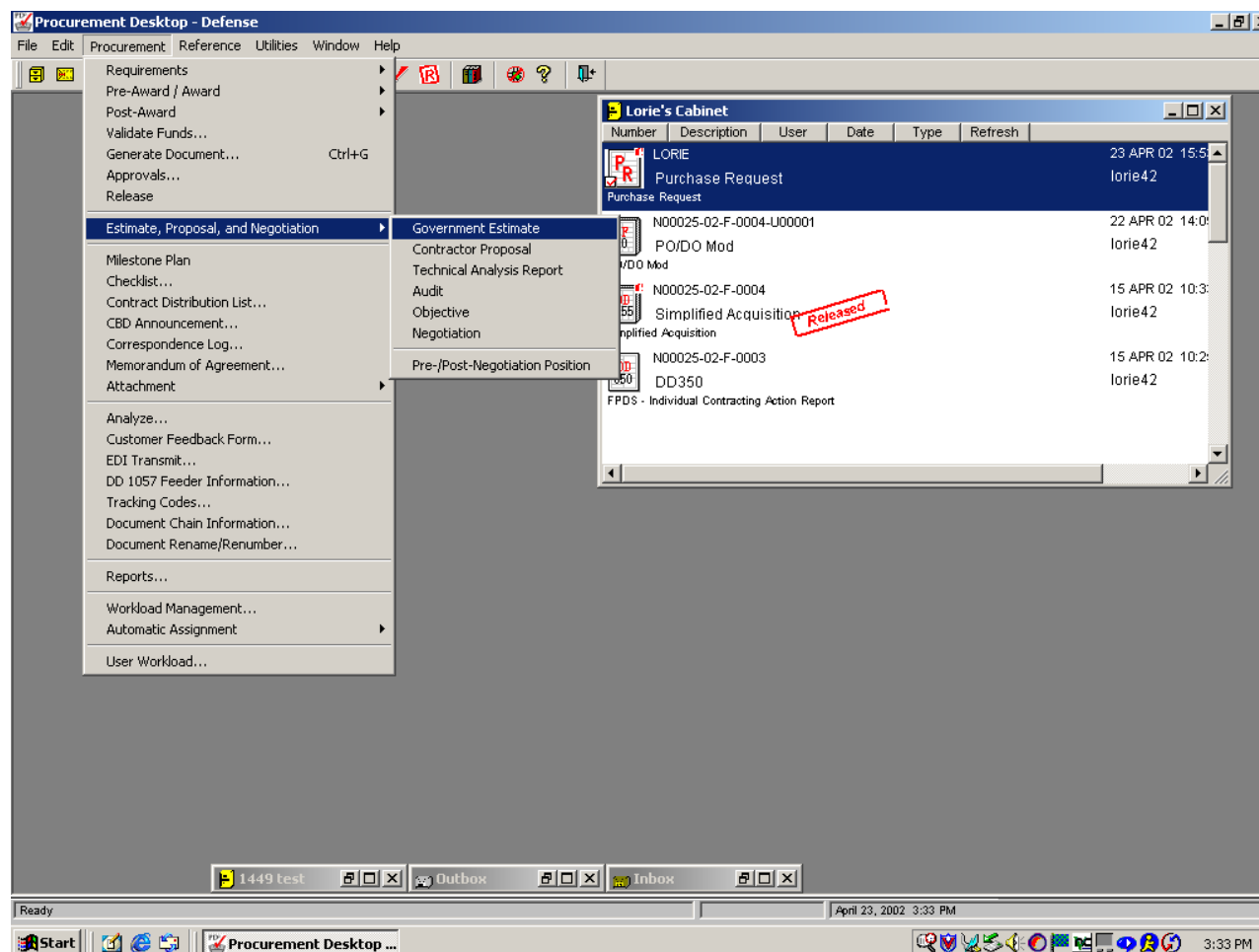




Government Estimate



- **Document Process**





Government Estimate (cont'd)



Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

Lorie's Cabinet

Number	Description	User	Date	Type	Refresh
PR	LORIE		23 APR 02 15:5		
PR	Purchase Request	lorie42			
SP	Purchase Request				

Create New Government Estimate

Number: LORIE

Description: Government Estimate

Template: AB - Services

AB - Construction

AB - Services

AB - Supplies

Allen's template 1

Change PRs - AB

Change PRs - BD

Change PRs-JEM

Select Template

Procurement Desktop - Defense

File Edit Document Options Window Help

Select Line Items

1. PR Line Items Added		Pre-Award: No Associated PR/Contract	
Line Item	Description	CLIN	PR Doc Number
0001			

2. Select Procurement Object		3. Select Line Items	
PR	Document Number	Line Item	Description
	LORIE		

Search

Add

Remove

OK

Cancel

Associate Line Items



Government Estimate (Cont'd)



Procurement Desktop - Defense

File Edit Document Options Window Help

Government Estimate - LORIE

Contract Info Pricing Cost Detail

GOVERNMENT ESTIMATE Date:

Contract Title: Select

Admin Office: NAVAL FACILITIES ENGINEERING COMMAND Contract Number:

Mod Number:

DO Number:

Description:

Estimated time extension and justification: days

Prime Contractor's Comments:

Prime Contractor's Name: Add

Contract Information

Procurement Desktop - Defense

File Edit Document Options Window Help

LORIE's Cabinet

Number Description User Date Type Refresh

LORIE 23 APR 02 15:5 lorie42

Purchase Request

Government Estimate - LORIE

Contract Info Pricing Cost Detail

Line Item

0001

Contract Line Item Information

Line Item Number: 0001

Contract Type: FFP Conformed Clin Total Cost:

Pricing Information

Quantity	X	Unit Price	=	Total
<input type="text"/>		<input type="text"/>		<input type="text"/>

Associated Source Documents Distributed Amount Auto Distribute

LORIE 0.00

Line Item Pricing Information

Pricing Detail

Procurement Desktop - Defense

File Edit Document Options Window Help

Government Estimate - LORIE

Contract Info Pricing Cost Detail

Line Item

0001

1. Quantity	<input type="text"/>
2. Labor	<input type="text"/>
3. Material	<input type="text"/>
4. Mod Total	<input type="text"/>
5. Conformed Total	<input type="text"/>
6. New Conformed Total Cost	<input type="text"/>



Pre/Post Negotiation Position



Procurement Desktop - Defense

File Edit Document Options Window Help

negotiation documentation

Number	Description	User	Date	Type	Refresh
N00025-02-C-0005-P00001	Contract Mod				
TEST-AMS-1-0001	Pre-/Post-Negotiation Position				
TEST-AMS-1-0001	Government Estimate				
TEST-AMS-1-0001	PR Mod				
N00025-02-C-0005	Award / Contract				
TEST-AMS-1	Purchase Request				

Contract Info Conditions Pricing Cost Detail

Contract Title: Award / Contract Date: 25-Apr-2001

Admin Office: NAVAL FACILITIES ENGINEERING COMMAND Contract Number: N00025-02- Mod Number: DO Number:

Description: Services

Estimated time extension and justification: days

Prime Contractor's Comments:

Prime Contractor's Name: 20TH CENTURY MACHINE CO BV Delete

Pre-/Post-Negotiation Position - TEST-AMS-1-0001

Contract Info Conditions Pricing Cost Detail

Line Item Line Item Info: 0001 Services

Line Item	Contract Type	Gov't Estimate	Contractor Proposal	Objective	Negotiation
0001	FFP	1.00	1.00	1.00	1.00
0002					
0003					
1					
Unit Price		50,000.00	50,000.00	50,000.00	50,000.00
Total		50,000.00	50,000.00	50,000.00	50,000.00

Associated Source Documents

	Auto Distribute Govt Est	Auto Distribute Ctr Proposal	Auto Distribute Govt Obj	Auto Distribute Negotiation
TEST-AMS-1-0001	50,000.00	50,000.00	50,000.00	50,000.00

- Consolidates data from previously created documents
- Can be created independently with direct data input



Pre/Post Negotiation Information in Requirement Status



Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

negotiation documentation

Requirement Status - PR Mod: TEST-AMS-1-0001

Line Items for Selected Document

Item/Subitem Number	Description:
0001	Services
0002	Services
0003	Services

Line Item Status Details

Line Item Description: Services

Currency: US \$

Original Amount: 250,000.00

Award Status: Planned

Pricing Status: Negotiated

Estimated Amount: 50,000.00

Proposed Amount: 50,000.00

Objective Amount: 50,000.00

Negotiated Amount: 50,000.00

Mod Linked Document	Doc Code	Release Date
---------------------	----------	--------------

Selected PR

TEST-AMS-1-0001
PR Mod
PR Mod

OK Cancel



Post-Award



- Associate and Link Line Items
- Modification Numbers
- Summary of Changes
- Concurrent Modifications
- Page Breaks
- No Cost Cancellation
- Closeout



Associate and Link Line Items



- Associates a PR line item that changes an existing contract CLIN with that CLIN
- Links modification CLIN to PR Line Item
- Links definitized modification CLIN to undefinitized CLIN
- Displays all associations established between the PR Line Items and Contract CLINs



Associating PR Clins to Contract Clins in v4.2



PR Mod - LH-01-0001 [Read Only]

Main Form | Line Items | **Contracts** | Add'l Data | Clauses

Contract Data	Description PR Mod	Purchase Request Number LH-01-0001	
	Requisition Date 10-Apr-2001	DPAS Priority Rating POC9e	Priority 12
Suggested Type of Contract Firm Fixed Price	Suggested Contracting Officer's Representatives No Cors Defined		
See Line Item Detail for Proposed Individual CLIN Contract Types			
Suggested Contract Information Contract/Agreement Number:		KO Notes	
<input type="radio"/> Delivery Order <input type="radio"/> Modification <input type="radio"/> Association		PD? Will this PR be used to establish associations? <input type="button" value="Yes"/> <input type="button" value="No"/> <input type="button" value="Cancel"/>	
Suggested Preference Program No Preference / Not Listed		<input type="button" value="Add"/>	

PR Mod - LH-01-0001 [Read Only]

Main Form | **Attachment Selection** | Clauses

Search Criteria N00025-01-P-0008%	Document Type Released Contract (Conformed Copy)
Search By <input checked="" type="radio"/> Document Number <input type="radio"/> Month Issued <input type="radio"/> Document Title <input type="radio"/> Issuing Office	
<input type="button" value="Search"/>	<input type="button" value="Select"/> <input type="button" value="Cancel"/>
N00025-01-P-0008-P00001 P0/DO Mod	
<input type="button" value="Add"/>	

☐ Delivery Order
☐ Modification
☐ Association

Suggested Preference Program
No Preference / Not Listed

Click the **Select** button. Click **Yes** when this window opens to establish an association, Click **No** to not associate. Either response brings up the **Attachment Selection** window.



Associating PR Clins to Contract Clins in v4.2



Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

PR Mod - LH-01-0001 [Read Only]

Main Form Line Items Contracts Add'l Data Clauses

Contract Data

Description	PR Mod	Purchase Request Number	LH-01-0001
Requisition Date	10-Apr-2001	DPAS Priority Rating	POC9e
		Priority	12

Suggested Type of Contract
Firm Fixed Price

Suggested Contracting Officer's Representatives
No Cors Defined

See Line Item Detail for Proposed Individual CLIN Contract Types

Associated Contract Information
Contract/Agreement Number:
N00025-01-P-0008-P00001

☐ Delivery Order ☐ Modification ☒ Association

Suggested Preference Program
No Preference / Not Listed

Edit Associations

KO Notes

Associate Line Items

1. Select the PR line item to be associated

Line Item	Description
0001	widgits
0002	widgits

3. Contract line items associated to PR line items

Line Item	Description
0001	widgits

Reset **Associate** Remove OK Cancel

Selected Contract

Contract Used for Associations
N00025-01-P-0008-P00001

2. Select the Contract line item to be associated

Line Item	Description
0002	widgits

Associated Contract Information is now reflected as well as the Contract Number. Double click **Edit Associations** button. This can also be edited when in "read only"-mode.

Highlight 0001 in **Block 1** and 0001 in **Block 2**, double click the **Associate** button and 0001 displays in **Block 3**.



Modification Linking in v4.2



Procurement Desktop - Defense

File Edit **Procurement** Reference Utilities Window Help

Requirements
Pre-Award / Award
Post-Award
Validate Funds...
Generate Document... Ctrl+G
Approvals...
Release
Estimate, Proposal, and Negotiation
Milestone Plan
Checklist...
Contract Distribution List...
CBD Announcement...
Correspondence Log...
Memorandum of Agreement...
Attachment
Analyze...
Customer Feedback Form...
EDI Transmit...
DD 1057 Feeder Information...
Tracking Codes...
Document Chain Information...
Document Rename/Renumber...
Reports...
Workload Management...
Automatic Assignment
User Workload...

Modification
Modification Linking...
Multiple Contracts Modification...
Orders
Agreement Orders/Contracts
BPA Call...
Imprest Fund Management...
Award Status...
Agreement Status...
Vendor Performance...
Audit Tracking...
Vendor Dispute Tracking...
Closeout
Termination
No Cost Cancellation
Agreement Discontinuation
Contract Data Cover Sheet...
Delivery
Discrepancy Report
Payment Request
Payment
Tracking Source...

Contract Mod Linking - N00025-01-P-0003-P00001 (Read-Only)

1. Select the line item to be linked

Item	Description	Definitization		
		Yes	No	Partial
0001	TIRES	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
0002	TIRES	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
0003	TIRES	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Find Item : % Find Link Unlink OK Cancel
By : Item Number

2. Select procurement object to be linked

PR Modification Estimating Doc PNP Find PR: % Find

PR	PRLIN	Description
----	-------	-------------

3. PR line items linked to Mod line items



Modification Numbers in v4.2



- Modification allows 2nd digit alpha (i.e., PK0001, AZ0001)
- Updates the fields of remaining unreleased concurrent modifications once a modification is released
- The **Modification Type** window opens prior to release of any modification



Modification Numbers In V4.2 - PZ Mod to Definitize a Letter Contract



Modification Type

☒ Procuring Office Modification ☐ Administering Office Modification

Number: 0001

OK **Cancel**

PR/PR Mod
Folder

Lorie's Cabinet

Number	Description	User	Date	Type
N00025-01-C-0001-PZ0001	Contract Mod			
N00025-01-C-0001	Award / Contract			
PR/PR Mod Folder				

Released **Released**



Summary of Changes in v4.2



- Recognizes Global Changes for an entire range of CLINs instead of itemizing each one



Summary of Changes in v4.1x



Microsoft Word - Document in PO/DO Mod - N00025-01-P-0007-P00001 [Read Only]

File Edit View Insert Format Tools Table Window Help

SECTION SF 30 BLOCK 14 CONTINUATION PAGE

SUMMARY OF CHANGES

Changes in Solicitation/Contract/Order Form

The total cost has decreased from ~~\$90,000.00~~ by \$15,000.00 to \$75,000.00

Changes in Section B

CLIN 0001

The total CLIN cost has decreased from \$30,000.00 by \$5,000.00 to \$25,000.00
The unit price amount has decreased from \$300.00 by \$50.00 to \$250.00

CLIN 0002

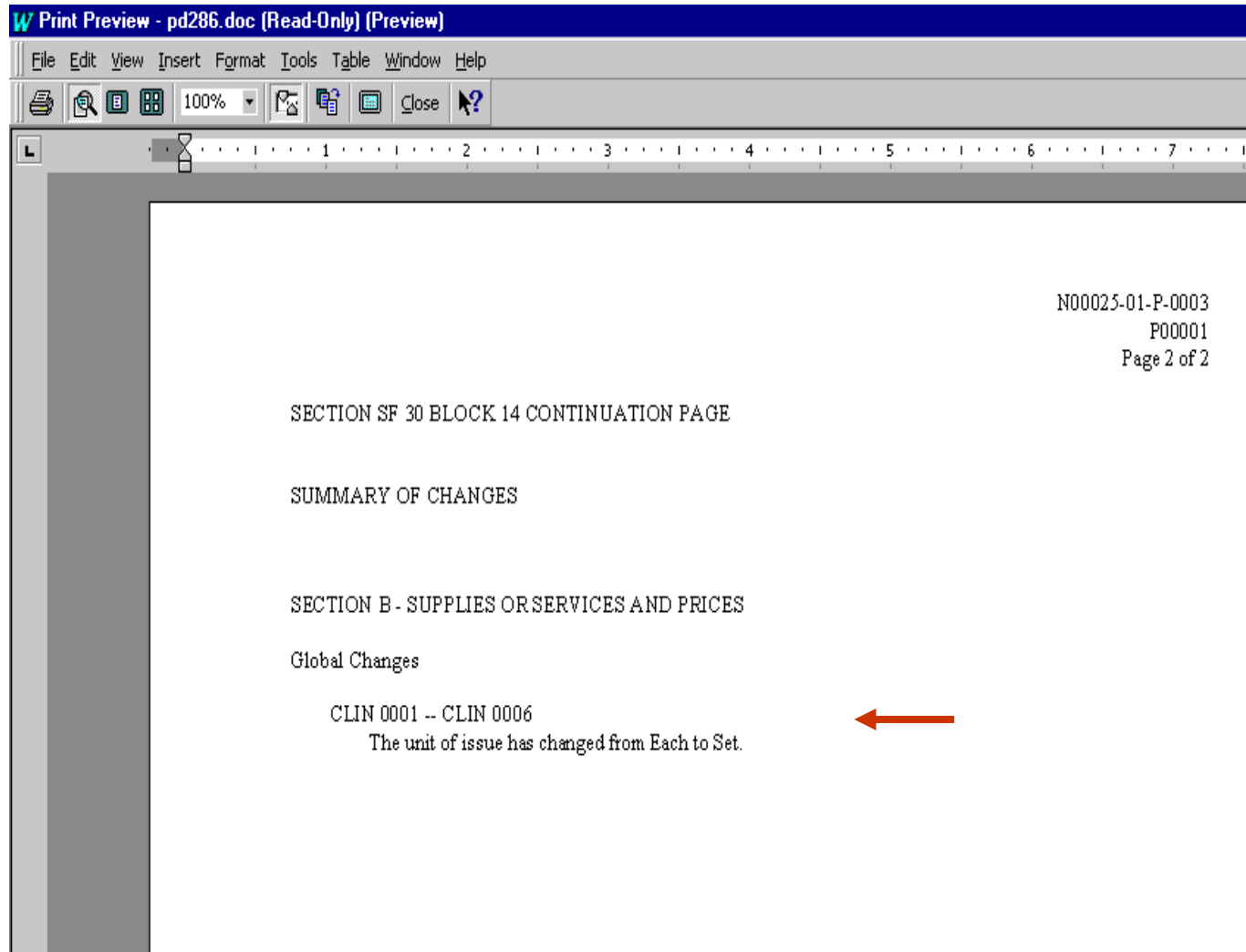
The total CLIN cost has decreased from \$30,000.00 by \$5,000.00 to \$25,000.00
The unit price amount has decreased from \$300.00 by \$50.00 to \$250.00

CLIN 0003

The total CLIN cost has decreased from \$30,000.00 by \$5,000.00 to \$25,000.00
The unit price amount has decreased from \$300.00 by \$50.00 to \$250.00



Summary of Changes in v4.2





Concurrent Modifications



- In v4.2, the Summary of Changes in Concurrent modifications displays properly.
- The CLIN identification, funding, and duplicate alerts function as designed.
- No longer receive a concurrent mod error when releasing a modification.
- Updates the fields of remaining unreleased concurrent modifications once a modification is released.



Page Breaks in v4.2



- No more blank last page!
- SF 30 Page Breaks based on available space from the page above



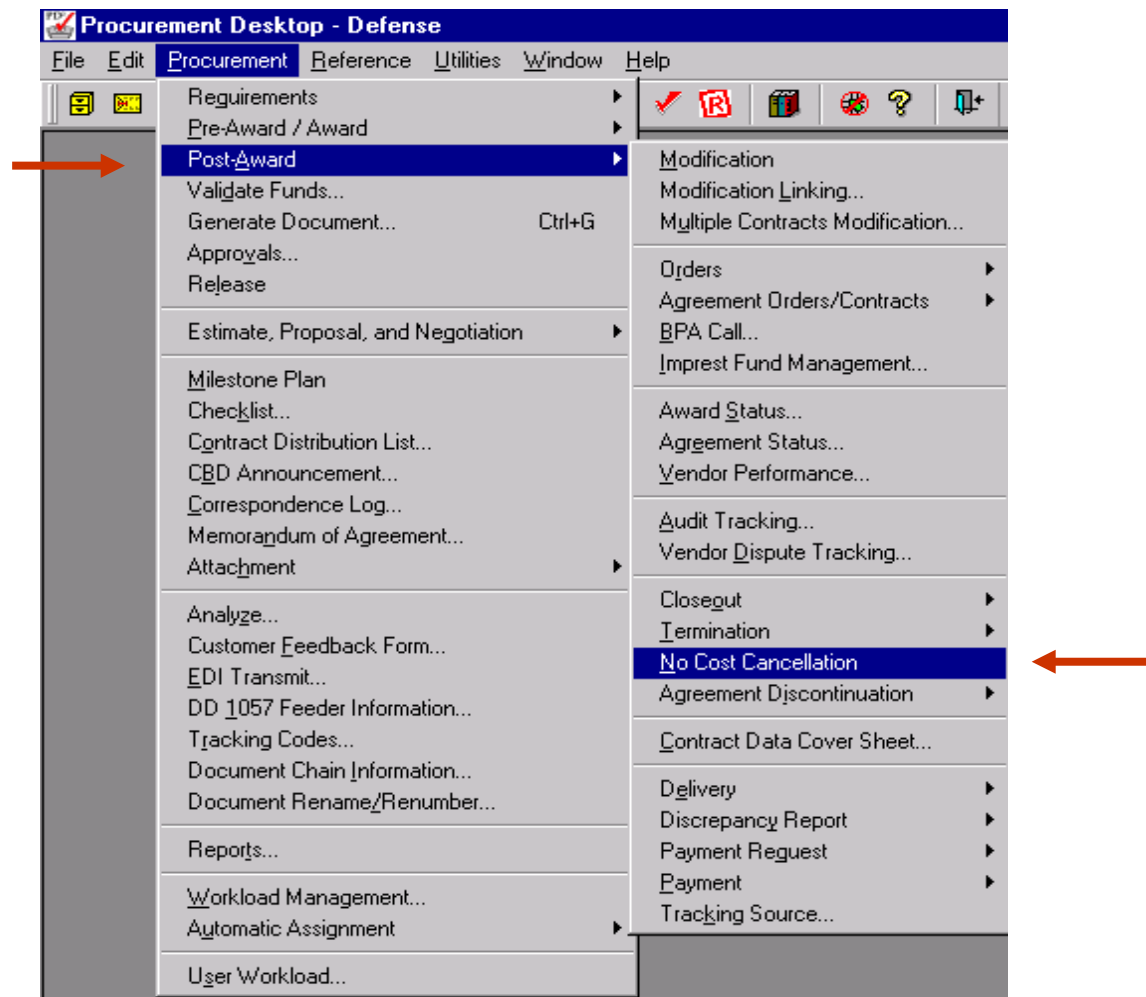
No Cost Cancellations



- Termination is no longer the only option
- Process is the same as termination
- Fully or partially cancel awards
 - Document Level or Line Item Specific
 - Funds are returned to the available balance!

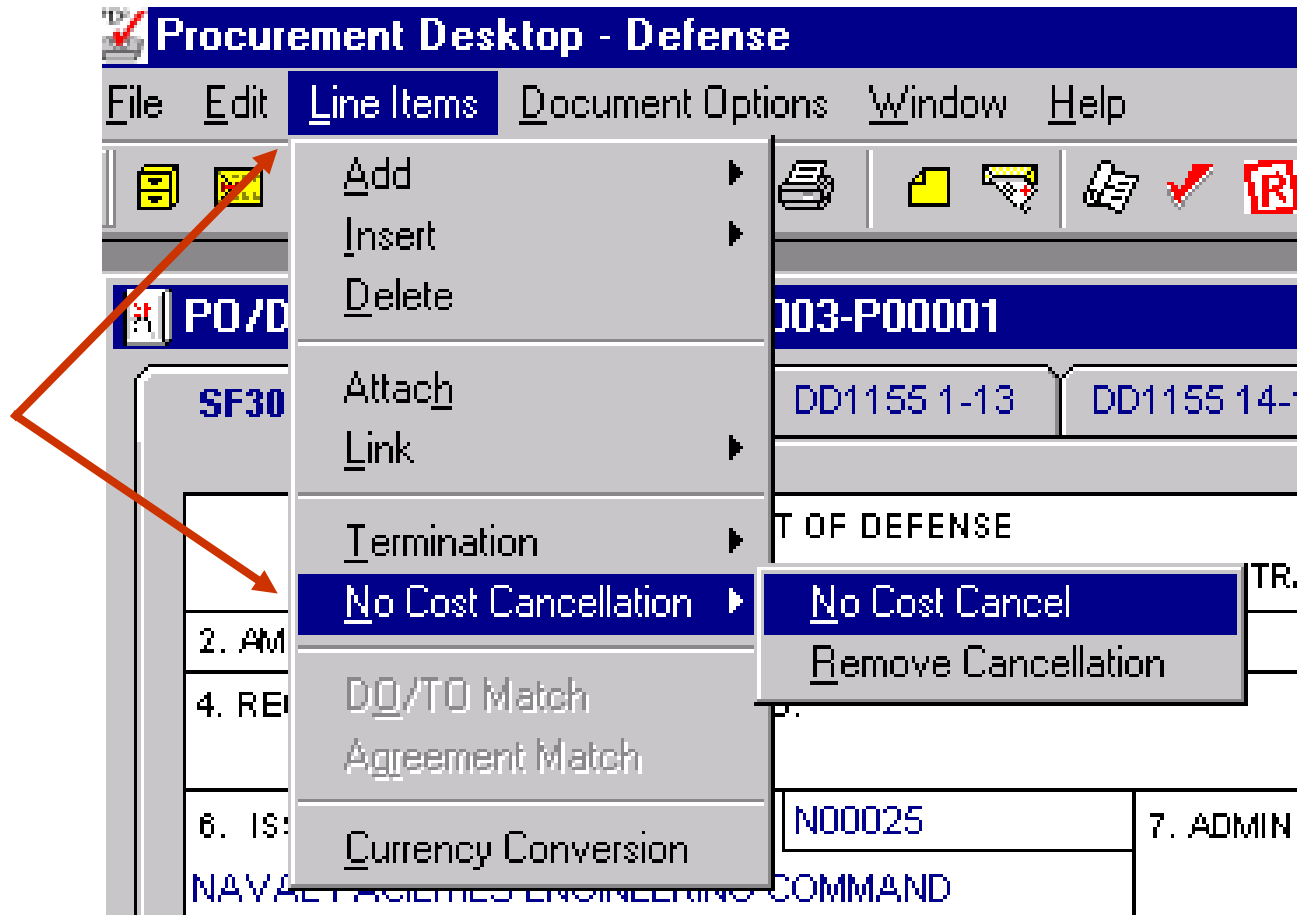


No Cost Cancellations in v4.2 - Document Level





No Cost Cancellations in v4.2 - Line Item Specific



- Note: Highlight Line Item in Document



Closeout



- Transmits final payment date and contract closeout actions on DD 1594 to DFAS, ACO and PCO via EDI 567 transaction
- Document level final delivery and payment data in Tracking Source and Award Status
- Allows manual closeout for BPA Calls by attaching DD1597 and DD 1594



Manual Closeout for BPA Calls in v4.2



Small Purchase

Number	Description	User	Date	Type
N00025-01-A-0001-0001	Contract Closeout Checklist			
N00025-01-A-0001-0001	Contract Completion Statement			
N00025-01-A-0001-0001	BPA Call			
N00025-01-A-0001	Blanket Purchase Master Agreement			

Contract Closeout Checklist - N00025-01-A-0001-0001

Items 1-5e | Items 5f-5l | Items 5m-5s | Items 5t-9

CONTRACT CLOSEOUT CHECK-LIST	
1. CONTRACT NUMBER N00025-01-A-0001-0001	
2. CONTRACT MODIFICATION NUMBERS (if applicable) No released modifications	
3. NAME OF CONTRACTOR AMERICAN MANAGEMENT SYSTEMS, INC.	
4. DATE OF PHYSICAL COMPLETION (YYMMDD) <input type="text"/>	6. MILESTONES / CALENDAR MONTHS AFTER PHYSICAL COMPLETION (FAR 4.804-1) <input type="text"/>
7. FORECAST COMPLETION DATE (YYMMDD) <input type="text"/>	
8. DATE ACTION COMPLETED (YYMMDD) (N/A if not applicable)	
5. ACTION ITEMS CATEGORY 2	
<input checked="" type="checkbox"/> a. DISPOSITION OF CLASSIFIED MATERIAL COMPLETED	<input type="text"/>
<input checked="" type="checkbox"/> b. FINAL PATENT REPORT SUBMITTED (Inventions Disclosures) DD 882	<input type="text"/>
<input checked="" type="checkbox"/> c. FINAL ROYALTY REPORT SUBMITTED	<input type="text"/>
<input checked="" type="checkbox"/> d. FINAL PATENT REPORT CLEARED (Inventions Disclosures)	<input type="text"/>
<input checked="" type="checkbox"/> e. FINAL ROYALTY REPORT CLEARED	<input type="text"/>

Contract Completion Statement - N00025-01-A-0001-0001

Items 1-7 | Items 8 | Item 10

CONTRACT COMPLETION STATEMENT	
FROM: (Contract Administration Office) NAVAL FACILITIES ENGINEERING COMMAND	
2a. PII NUMBER N00025-01-A-0001-0001	
2b. LAST MODIFICATION NUMBER	
2c. CALL/ORDER NUMBER	
4. CONTRACTOR IDENTITY CODE 22332 AMERICAN MANAGEMENT SYSTEMS, INC.	
5. EXCESS FUNDS \$0.00 YES NO <input type="checkbox"/> IN PROCESS	
6a. IF FINAL PAYMENT HAS BEEN MADE, COMPLETE ITEMS 6b., AND 6c.	6b. VOUCHER NUMBER <input type="text"/>
	6c. DATE <input type="text"/>
7a. IF FINAL APPROVED INVOICE FORWARDED TO D.O. OF ANOTHER ACTIVITY AND STATUS OF PAYMENT IS UNKNOWN, COMPLETE ITEMS 7b. and 7c.	7b. INVOICE NUMBER <input type="text"/>
	7c. DATE FORWARDED <input type="text"/>

Sustaining the Combat Capability of America's Air Force



Integrity - Service - Excellence